Infor ERP Infinium MM/PR

Advanced Planning

Guide to Setup and Processing



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Publication Information Release: Infinium PM Release 12.2 Publication Date: June 2008 Document Number: 20030402123036-01

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About This Guide

This section focuses on the following information:

- Purpose of this guide
- Conventions used in this guide

Intended Audience

This guide is for personnel who will be responsible for the implementation, maintenance and daily activities of Infinium Advanced Planning, including project managers, production managers, material planners, team leaders, internal trainers and data entry staff.

This guide assumes you already have Infinium Cross Applications, Infinium Formula Management, Infinium Order Processing, Infinium Purchase Management, Infinium Manufacturing Control and any other applicable Infinium applications set up before following the steps and instructions contained in this guide.

Purpose of This Guide

This guide shows you how to use Infinium Advanced Planning to complete specific planning tasks and provides you with information about various Infinium Advanced Planning concepts.

Organization of This Guide

This guide is divided into parts. Each part contains overview and detail information. Appendices in this guide contain additional reference information.

Conventions Used in This Guide

This section describes the following conventions we use in this guide:

• Fonts and wording

- Function keys
- Character-based vs. graphical interface
- Prompt and selection screens
- Promptable fields
- Infinium applications and abbreviations

Fonts and Wording

Convention	Description	Example
Italic typeface	Menu options and field names The guide uses the same abbreviations as the screen.	<i>Work With Controls</i> Use <i>Max Lnth</i> to specify the maximum length of alpha user fields.
Bold standard typeface	Used for notes, cautions and warnings	Caution: You must ensure that all Infinium Advanced Planning users are signed off before reorganizing and purging. If there are jobs in the queue, those files will not be reorganized.
Bold monospaced typeface	Characters that you type and messages that are displayed	Type A to indicate that the position is alphanumeric and type N to indicate that the position is numeric. The following message is displayed:
F2 through F24	Keyboard function keys used to perform a variety of commands.	Company not found Press F2 to display a list of available function keys.
F13 through F24	Function keys higher than F12 require you to hold down the Shift key and press the key that has the number you require minus 12.	Press F19 to work with project and activity comments.
Select	Choose a menu option or choose a record or field value after prompting.	Select Work with Customers and press Enter. Select C (capitalization), E (expense) or B (both) as the <i>Capitalization code</i> value.

Convention	Description	Example
Press Enter	Provide information on a screen and when you have finished, press Enter to save your entries and continue.	Press Enter to save your changes and continue.
Exit	Exit a screen or function, usually to return to a prior selection list or menu. May require exiting multiple screens in sequence.	Press F3 to return to the main menu.
Cancel	Cancel the work at the current screen or dialog box, usually to return to the prior screen.	Press F12 to cancel your entries.
Help	To access online help for the current context (menu option, screen or field), press Help (or the function key mapped for help).	Press Help for more information about the current field.
	To move through the other applicable levels of help, press Enter at each help screen. To return directly to the screen from which you accessed help, exit the help screen by clicking Exit or by pressing F3.	
[Quick Access Code]	Quick access codes provide direct access to functions. Some quick access codes in Infinium Advanced Planning consist of the first letter of each word of the menu option name.	Select Work with Customers [WWC].
	Quick access codes are listed on the Menu Tree and in the path for each task next to the executable function.	
Publication and course titles	Unless otherwise stated, titles refer to Infinium applications and use standard name and abbreviations.	Infinium Advanced Planning Guide to Setup and Processing is referred to as Infinium MP Guide to Setup and Processing.

Function Keys

Infinium AM function keys and universal Infinium MP function keys for the IBM AS/400 or \sim iSeries are described in the following table. All Infinium MP function keys are identified at the bottom of each screen.

Function Key	Name	Description
	Help	Displays help text
F2	Function keys	Displays window of valid function keys
F3	Exit	Returns you to the main menu
F4	Prompt	Displays a list of values from which you can select a valid entry
F10	Quick Access	Enables you to access another function from any screen
		Type the quick access code in <i>Level</i> . You can change the application designator, such as PA, GL, MP and so forth, by selecting another application.
F12	Cancel	Returns you to the previous screen
F22	Delete	Deletes selected item(s)
F24	More keys	Displays additional function keys at the bottom of the screen

Prompt and Selection Screens

A prompt screen, similar to Figure 1, is the screen in which you type information to access a record or a subset of records in a file.

A selection screen, similar to Figure 2, is the screen from which you select a record or records to perform an action.

When we first explain a task in this guide, we fully document how you access a prompt and selection screen. If a related task uses that prompt or selection screen, we include the prompt and selection steps in that task. However, we do not include the screen(s) again.

2/01/1998	9:00:00	Warehouse Security Maintenance	DMGWSM	DMDWSM
Company User profile	••••			
F3=Exit F4=	Prompt F10)=QuikAccess		

Figure 1: Warehouse Security Maintenance prompt screen

2/01/1998 9:00:0		5	WSM DMDWSM
User profile	M	MIRAIN	
Enter 0 to restrict	access ; 1 to allow	access	
1 IŠI ISWI INFI	Description NIUM WAREHOUSE #1 NIUM WAREHOUSE #3	HYANNIS DENNIS	Ma Ma
			Bottom
F3=Exit F10=QuikAc	Cess		

Figure 2: Warehouse Security Maintenance selection screen

Promptable Fields

A plus sign displayed next to a field indicates that you can choose your entry from a list of possible values. Place the cursor in the field and press F4 to display a list of values.

To select an entry perform one of the following:

- Position the cursor at the desired value, type **1** and press Enter.
- Type the value in the appropriate field.

Infinium Applications and Abbreviations

The following table lists Infinium names and the corresponding product abbreviations that are associated with this product.

Application	Abbreviation
Infinium Application Manager Infinium Application Manager Extended	Infinium AM Infinium AM/X
Infinium Query Infinium Query Extended	Infinium QY Infinium QY/X
Infinium Financial Management Suite	Infinium FM
Infinium Accounts Receivable	Infinium AR
Infinium Currency Management	Infinium CM
Infinium General Ledger	Infinium GL
Infinium Global Taxation	Infinium GT
Infinium Payables Ledger	Infinium PL
Infinium Project Accounting	Infinium PA
Infinium Purchasing/Payables Exchange	Infinium PX
Infinium Materials Management Suite	Infinium MM
Infinium Materials Management Suite Infinium Cross Applications	Infinium MM Infinium CA
Infinium Cross Applications	Infinium CA
Infinium Cross Applications Infinium Electronic Exchange	Infinium CA Infinium EX
Infinium Cross Applications Infinium Electronic Exchange Infinium Inventory Control	Infinium CA Infinium EX Infinium IC
Infinium Cross ApplicationsInfinium Electronic ExchangeInfinium Inventory ControlInfinium Journal Processor	Infinium CA Infinium EX Infinium IC Infinium JP
Infinium Cross ApplicationsInfinium Electronic ExchangeInfinium Inventory ControlInfinium Journal ProcessorInfinium Order Processing	Infinium CA Infinium EX Infinium IC Infinium JP Infinium OP
Infinium Cross ApplicationsInfinium Electronic ExchangeInfinium Inventory ControlInfinium Journal ProcessorInfinium Order ProcessingInfinium Purchase Management	Infinium CA Infinium EX Infinium IC Infinium JP Infinium OP Infinium PM
Infinium Cross ApplicationsInfinium Electronic ExchangeInfinium Inventory ControlInfinium Journal ProcessorInfinium Order ProcessingInfinium Purchase ManagementInfinium Process Manufacturing Suite	Infinium CA Infinium EX Infinium IC Infinium JP Infinium OP Infinium PM Infinium PR
Infinium Cross ApplicationsInfinium Electronic ExchangeInfinium Inventory ControlInfinium Journal ProcessorInfinium Order ProcessingInfinium Purchase ManagementInfinium Process Manufacturing SuiteInfinium Advanced Planning	Infinium CA Infinium EX Infinium IC Infinium JP Infinium OP Infinium PM Infinium PM Infinium PR Infinium MP
Infinium Cross ApplicationsInfinium Electronic ExchangeInfinium Inventory ControlInfinium Journal ProcessorInfinium Order ProcessingInfinium Purchase ManagementInfinium Process Manufacturing SuiteInfinium Advanced PlanningInfinium Formula Management	Infinium CAInfinium EXInfinium ICInfinium JPInfinium OPInfinium PMInfinium PMInfinium PRInfinium MPInfinium MPInfinium PF

Related Documentation

For further information about Infinium Advanced Planning, refer to the following documents:

- Infinium Cross Applications Guide to System Controls and Materials Maintenance
- Infinium Formula Management Guide to Formula Setup and Quality Control
- Infinium Inventory Control Guide to Setup and Processing
- Program Reference Guide
- File/Field Descriptions
- Database Relations
- Online Help

Notes

Part 1 Infinium MP: An Overview

1

The part consists of the following topics:	
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Infinium MP Overview

Infinium MP is a tool designed to help you improve your manufacturing process. The system gathers and consolidates information about customer orders, purchase orders, and inventory, and provides information about material and resource requirements that will help you:

- Assess manufacturing requirements more accurately
- Schedule manufacturing and purchasing activities based on more accurate requirements
- Plan capacity requirements
- Ensure efficient use of capital items
- Manage inventory activities
- Schedule people and machines appropriately
- Track material, orders, equipment, and resources
- Respond to unexpected problems

The system provides the information you need to efficiently manage the flow of materials and effectively utilize equipment. As a result, you meet customer needs more efficiently, reduce and maintain inventory at lower levels, and reduce lead times and back orders.

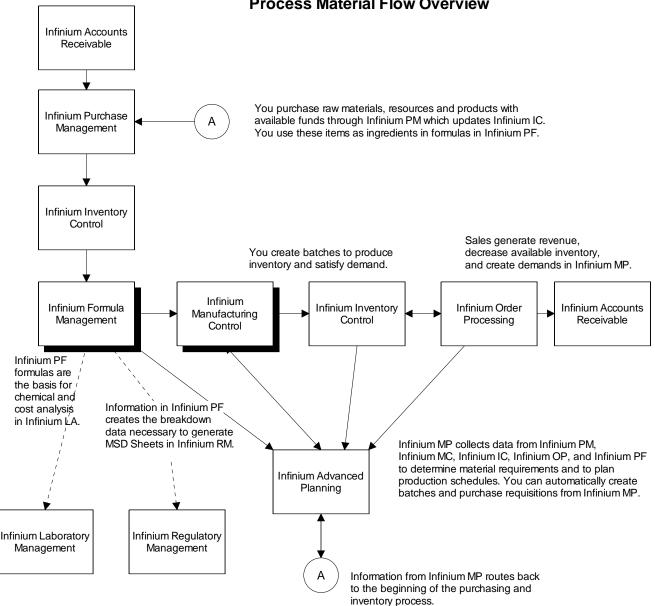
At the end of this part, you should understand the Infinium MP system and also be familiar with the following:

- Master Production Scheduling
- Material Requirements Planning
- Display and Reporting Options
- Infinium MP Terminology and Concepts

Understanding Infinium MP

To use Infinium MP to its fullest potential, you must install the following systems:

- Infinium CA: Contains many of the controls and parameters that govern Infinium MP functions and contains raw material and product records.
- Infinium PF: contains formula and bill of materials records for production.
- Infinium OP: contains customer order information.
- Infinium PM: contains purchase order information. You can create purchase requisitions directly from Infinium MP after generating an MPS or MRP.
- Infinium MC: contains information about batches. You can create new batches directly from Infinium MP after generating an MPS or MRP.
- Infinium IC: contains available inventory balances for items on an MPS or MRP.



Process Material Flow Overview

Figure 1-1: Infinium MP Integration

Infinium MP uses the following information:

- Customer orders retrieved from Infinium OP
- Forecast information established through the manual forecasting option in • Infinium MP or some other forecasting software you have installed
- Receipts and items on order from Infinium PM
- Batch information from Infinium MC
- Projected available inventory balances from Infinium IC

The system consolidates this information and, from the results of the master production schedule or material requirements plan it generates, you can create purchase requisitions and schedule batches to meet your manufacturing needs.

Master Production Scheduling

Master Production Scheduling is a time-phased planning activity that uses firm and planned quantities of demand, supply, and inventory balances to develop a master production schedule required to meet forecast amounts and customer orders. The *Master Production Scheduling* menu includes the following options, which you use in the order listed.

- 1 Use the *MPS Generation Selection* option to specify criteria for a plan and generate an MPS. You can generate multiple schedules for the same criteria. After analyzing each, authorize one MPS per company.
- 2 Use each MPS as the basis for your manufacturing and purchasing decisions. The MPS also serves as the basis for the Material Requirements Plan.
- **3** Use the *Master Schedule Authorization* option to authorize a Master Production Schedule.
- 4 Use the *Maintain MPS* option to create batches in Infinium MC or purchase order requisitions in Infinium PM for individual items on a MPS.
- **5** Use the *Display Master Production Sched* option to view the results of an MPS. The system displays past due quantities and quantities for each time period included in the plan for each of the following categories:
 - Forecast
 - Available
 - Orders
 - Plan Available to Promise
 - Receipts
 - Suggested
 - Firm Planned Orders
- 6 You can also view the selection criteria for the MPS.
- 7 Use the *MPS Exception Reporting* option to print a report of selected information from an MPS if you did not generate the report as part of the MPS run.
- 8 Use the *Demand Fulfillment Workbench* option to change demand requirements to achieve the needed inventory quantities for the MPS and MRP.

Material Requirements Planning

Material Requirements Planning uses the formula or bill of material, inventory data, Master Production Schedule, customer orders, production orders and purchase orders to calculate requirements for materials. The *Material Requirements Planning* menu has the following options, which you use in the order listed.

- 1 Use the *MRP Generation Selection* option to generate a Material Requirements Plan. Select an MPS on which to base the plan. The system retrieves the formula and bill of material records required to produce the products and explodes them to net the required quantities against the available inventory quantity. This determines the requirements for individual line items: the materials and resources needed to complete production of a particular item.
- 2 Use the *Maintain MRP* option to create batches in Infinium MC or purchase order requisitions in Infinium PM for individual items on an MRP.
- 3 Use the *Display Material Requirements* option to view the results of a Material Requirements Plan. The system displays past due quantities and quantities for each time period included in the plan for each of the following categories:
 - Independent Demand
 - Projected On Hand
 - Dependent Demand
 - Planned Order Receipt
 - Receipts
 - Planned Order Release
 - Projected Available
- 4 You can also view the selection criteria for the MRP.
- 5 Use the *MRP Exception Reporting* option to print a report of selected information from an MRP.
- 6 Use the *Demand Fulfillment Workbench* option to change supply and demand requirements to achieve the needed inventory quantities for the MPS and MRP.

Displays and Reporting Options

In addition to the reports available through the *Master Production Scheduling* and *Material Requirements Planning* menus, Infinium MP has several display and report options that provide different types of information to help in your manufacturing planning process.

Terminology and Concepts

This section contains Infinium Software and Infinium MP terminology you should be familiar with before you go on to the detail parts.

Action Messages

The system includes these messages on MRP and MPS displays and reports warning of problems with the plans generated by processing the MRP or MPS. These messages specify the type of action that you should take. For example, action messages can suggest that you create new orders, cancel an existing order, or change an existing delivery date.

Available to Promise (ATP)

The uncommitted portion of your inventory or planned production. Determine the inventory types included in the ATP calculations and how the system handles them in the *Work with Inventory Type File* option in Infinium IC.

Backlog

The sum of all customer orders booked but not shipped; this is also referred to as open orders.

Chase

Chase implies maintaining a constant inventory, as opposed to building an inventory. Chase only involves forecasted values.

Consumption Rules

The rules governing the consumption of the master schedule. Infinium MP provides four consumption methods: forecast, customer orders, the greater of forecast or customer orders, and forecast plus customer orders.

Controlling Warehouse

The system requires a controlling warehouse when you create one MPS plan that includes multiple warehouses. The system uses the MPS controls defined for the controlling warehouse in place of individual warehouse controls. If controls are not set at the controlling warehouse, the system goes up the hierarchy.

Critical Item

Items that you want to include on the Rough Cut Planning report. Define materials and products as critical items in the Item Warehouse file.

Daily Capacity

A quantity you enter for an item in the Item Warehouse file that the system uses as the maximum allowed daily usage for materials and resources. The system uses daily capacity for the Resource Load Summarization display and report and the Rough Cut Planning report.

Days Unit of Measure

A unit of measure used to convert the quantity you enter for a time bucket to a number of days.

Demand Fulfillment Workbench

This central workbench provides a place for production controllers and material managers to manage and correct exception situations. This workbench allows you to reply to multiple action messages to correct and alleviate inventory problems.

Dependent Demand

The type of demand the system calculates for the need to manufacture or replenish inventory for a higher level item. A component used in a subassembly or intermediate would have dependent demand.

Drill Down

A feature of the MPS and MRP display options allowing the user to display detail that makes up each of the theoretical inventory quantities retrieved from Infinium MC, Infinium OP, and Infinium PM. Using these displays, you can "drill down" all the way to the batch, sales order, or purchase order detail for any item on the MPS or MRP.

Entity Formula

A formula that is not associated with a specific company or warehouse. This formula is also referred to as a global formula.

Formula by Effective Date

You can create multiple instances of a formula with different effective dates. These formulas can be at the entity level or can be location-specific. You can use the same formula ID to create multiple instances of a formula and modify the effective dates and ingredients and/or instructions due to seasonal changes.

Formula by Location

Formulas or bills of material that are specific to companies or warehouses. For example, you can create different versions of the same formula or bill of material for a specific location using the same formula identifier or bill of material identifier.

Formula Instance

A single copy of a formula with the same formula identifier for which you modify its attributes to make it a unique formula. You create formula instances for formula variations. For example, you can create an instance of a formula and modify its ingredients, instructions, effective dates, and/or use by a specific location.

Global Formula

A formula that is not associated with a specific company or warehouse. This formula is also referred to as an entity formula.

Gross Demand

The total of independent and dependent demand for a finished item or assembly prior to the netting of on hand inventory and scheduled receipts.

Gross Requirements

The total of independent and dependent demand for a component of a finished good prior to the netting of on-hand inventory and scheduled receipts.

Explode

The method the system uses to determine the demand for the components of a parent item. The system calculates demand by multiplying the parent item requirements by the component item usage specified by the formula/bill of material.

Firm Planned Order

An order, frozen in quantity and time, that only a planner can change. This order status prevents automatic revision by the system.

Forecast Descriptions

A code you define to identify forecasts.

Independent Demand

The type of demand that is unrelated to the demand for other items. Demand for finished products and service parts requirements are examples of independent demand.

Infinium MM Suite

The Infinium MM Suite includes the following applications: Infinium CA, Infinium IC, Infinium PM, Infinium OP, and Infinium JP.

Infinium PR Suite

The Infinium PR Suite includes the following applications: Infinium PF, Infinium MP, Infinium RM, Infinium MC, and Infinium LA. Both the Infinium MM and Infinium PR suites use Infinium CA.

Inventory Types

Use inventory types to categorize different types of real and theoretical inventory. On hand, inspection, and rework are examples of real inventory types. On order from vendor, committed to sales, and work in process usage are examples of theoretical inventory types.

Lead Time

A span of time required to perform an activity. These activities include the procurement of materials and supplies from outside suppliers or from your own manufacturing facility. MPS prints the total lead time at the top of MPS report. The system uses the total lead time to generate the Open Order or Inadequate Lead Time messages.

Lot Size Technique

A method used to determine the order quantity for an item. You can use various lot size techniques, including Lot-for-Lot (L4L), Fixed Order quantity and Lot-for-Lot Min/Max. MPS and MRP generation use the lot size technique when creating planned orders.

Master Production Schedule (MPS)

A statement of what the company expects to manufacture. The MPS is a set of planning numbers that drives the MRP. The MPS takes into account the forecast, backlog, availability of material, management policies, and goals.

Material Requirements Plan (MRP)

An approach for calculating material requirements to generate replenishment orders and to reschedule open orders to meet changing requirements.

Net Requirements

The amount of material that you have to order to cover the difference between the total of current on-hand plus on order and the gross requirements. Net requirements, lot sized and offset for lead time, become planned orders.

Order Type

Used to classify orders in Infinium MC, Infinium PM, and Infinium OP. In Infinium MP, specify the order types to include in the MPS generation.

Pegging

The capability to identify, for a given item, the sources of its gross requirements and/or allocations.

Plan Identifier

A system-assigned code to identify the set of controls and parameters the system uses during the generation of the MPS and MRP.

Planner Code

A user-defined code you assign to an item to identify the planner responsible for that item. Specify the Planner code when generating the MPS or MRP.

Planning Horizons

The period of time measured from the current date to some future date for which you generate material plans.

Product Family

A code used to form groups of materials and products. Specify the product family when generating the MPS or MRP.

Rough Cut Capacity Planning

The process of converting the MPS into capacity needs for key materials and resources.

Safety Stock

The additional inventory and/or capacity carried as protection from forecast errors or fluctuations in the backlog. Establish this quantity in the Item Warehouse file in either Infinium CA or Infinium IC.

Scheduled Receipts

Receipts included on MPS and MRP reports and displays that reflect material quantities from open orders in Infinium MC and Infinium PM.

Starting Inventory

The sum of on-hand inventory plus any inventory types you establish as Other Inventory in the *Work with Inventory Type* option in Infinium IC.

Time Bucket

A time period the system uses to accumulate requirements for MPS and MRP reporting. The period defined by a time bucket depends on the Days Unit of Measure assigned to it.

Time Fence

A policy or guideline you establish to define where various restrictions in operating procedures take place. For example, you can easily make changes to the MPS beyond the cumulative lead time. Changes inside the cumulative lead time become

increasingly difficult as the lead time shortens, to a point where the schedule must be frozen and no changes made. Use time fences to define these points.

Warehouse Security

Warehouse security within Infinium MP restricts the warehouse locations that a user can access. You can change the warehouse security restrictions for Infinium MP by using the Infinium CA *Work with User/Whse Security* function.

Part 2 Maintaining Control Files

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Overview of Maintaining Control Files

Using the Infinium MP *Control Files* menu, define the rules and parameters the system uses to process the master production schedule and the material requirements plan.

Establish controls and parameters at the following levels:

- Entity, where the controls and parameters apply across all companies and warehouses within your organization
- Company, where the controls and parameters are set up for each company and its warehouses
- Warehouse, where the controls and parameters apply only to a specific warehouse within a company

The system retrieves information from these Control files based on a hierarchical search. The system searches the Warehouse Control file first, because it is the lowest in the hierarchy. If the system does not find the required information, it refers to the Company file, and then the Entity file, if necessary. Define controls and parameters at the company and warehouse levels only when you have exceptions to the Control file information at one of the higher levels.

The *Control Files* menu also includes options to define your forecast descriptions, maintain forecasts, establish time buckets, and maintain order type defaults.

After you complete this part, you should be familiar with the setup and maintenance of the Infinium MP Control files.

Maintaining Control Files

The entity, company and warehouse control files combine to form a hierarchy that the system uses when searching for default values during MPS and MRP processing. Beginning at the warehouse level, the search for the first non-blank field continues to the company and ends at the entity level. Using this concept, set your system-wide defaults at the entity level and then only complete the same field at the company or warehouse level when there are exceptions to the level above.

The screens and fields are similar for the options *Work with Entity, Work with Company*, and *Work with Warehouse*. The *Work with Entity* option contains all fields; therefore, this part only shows the entity level screens.

Depending on the level at which you establish a control, the control affects:

- Activity system-wide, such as a value entered in the Entity Control file.
- Only a certain company if set up in the Company Control file.
- A single warehouse if set up in the Warehouse Control file.

Use the menu path below.

- Control Files
 - ▼ *Work with Entity* [WWE] or
 - ▼ Work with Company [WWC] or
 - Work with warehouse [WWW]

Entity Attributes

If you selected Work with Entity, the screen below displays.

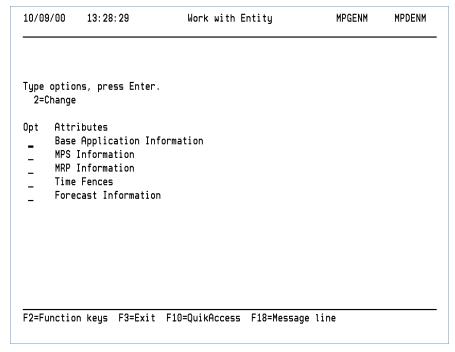


Figure 2-1: Work with Entity Attribute selection screen

Type **2** in the *Opt* field to select one or more attribute and press Enter.

If you select more than one attribute, as you complete each attribute screen, the system automatically moves on to the next attribute.

Base Application Information

	Base Applic	ation Information	ı	
Include Safety Sto Lot Size Technique	•	3 (1=MPS, 2=MRF 1 (1=Lot for la 2=Fixed Orde 3=Lot for la 4=User Exit)	ot er Quantity ot with min/max	
User Exit Lot Size Batch Number Default Batch Stat		MP 1 (0=Firm Plann 2=Work in Pr	ned, 1=Scheduled rocess)	I
Action Message Use Days Unit of Measu Status to Allow Ba	re	DA+ 1 (0=Neither, 1 3=Scheduled)	l=Both, 2=Firm P)	lanned
Allow Deletion of	Requisitions	N (Y=Yes, N=No))	
	Period	7_ _10_		
F2=Function keys	F3=Exit F4=Prompt	F10=QuikAccess	F24=More keys	

Figure 2-2: Base Application Information screen

Lot Size Technique

The lot size technique you use determines how the system orders products or materials.

1	The system generates planned orders in quantities equal
Lot for	to the net requirements in each period. An exact match is
Lot	made.
2 Fixed Order Quantity	The system generates planned orders for a predetermined fixed quantity. Define this quantity in the <i>Order Policy Quantity</i> field or multiples thereof in the <i>Order Multiple Quantity</i> field. These fields are in the Item Warehouse file.
3 Lot for Lot with Min/Max	This method is similar to the Lot for Lot except that the system must order at least a minimum quantity, which you establish in the <i>Order Policy Quantity</i> field. The order quantity cannot exceed the value in the <i>Maximum Reorder Quantity</i> field or fall below the amount in the <i>Minimum Quantity</i> field. These fields are in the Item Warehouse file.
4	Establish unique lot sizes through your own or non-
User Exit	Infinium programs.

Batch Number

The system assigns the value you type in the *Batch Number* field as the first two characters of the batch number assigned to any manufacturing orders created through Infinium MP. This assists you in identifying batches automatically created by Infinium MP.

Set up or reset the batch number for this batch identifier using the *Reset Manufacturing Batch Number* option in the *Utilities* menu.

If there is not a batch identifier in the *Batch Number* field, the system retrieves the batch identifier defined in Infinium MC.

Default Batch Status

This value determines the stage of the batches created by MRP or MPS.

Days Unit of Measure

Use this field to define a day in terms of production and material planning. The value you type must first be set up in the *Work with UM Conversion* option in Infinium CA. Refer to the *Infinium Cross Applications Guide to System Controls and Materials Maintenance* for information on setting up units of measure.

When you generate the Master Production Schedule as described in the "Master Production Scheduling" part, the system uses the *Days Unit of Measure* field to convert the units established in the *Work with Time Buckets* option to determine the starting dates for the time buckets in the MPS and MRP.

When you define the unit of measure **Day**, you should also establish other units of measure for each time period that includes days, such as **Week** or **Mnth**. The conversion factor for each of these must be equal to the number of days in that time period. For example, use **5** for **Week** or **30** for **Mnth**.

Status to Allow Batch Deletion

Use this field to define which batch status, if any, you can delete through the Demand Fulfillment Workbench.

0 Neither	You cannot delete batches from the Demand Fulfillment Workbench.
1 Both	You can delete both Firm Planned and Scheduled batches.
2 Firm Planned	You can only delete Firm Planned batches.
3 Scheduled	You can only delete Scheduled batches.

You cannot delete Work in Process batches from the Demand Fulfillment Workbench.

Allow Deletion of Requisitions

Type \mathbf{Y} in this field to allow the deletion of requisitions from the Demand Fulfillment Workbench.

In order to use this feature, a user profile must exist in Infinium PM with the proper security to delete requisitions.

When deleting requisitions, be careful to view each line item of the requisition to ensure that line items of products other than those needed by Infinium MP are not deleted.

A user profile must exist in Infinium PM in order to maintain requisitions also.

Planning Horizons

The *Planning Horizons* fields determine the MPS requirements that the system feeds to the MRP, and are separated between current and future periods.

Planning Horizons Present Cutoff Period

This period includes the period from the MPS start date through the period you type in this field. The system limits calculated requirements to the firm planned orders from the MPS due through the end of this period.

Planning Horizons Future Cutoff Period

This period includes the period from the Present Cutoff Period through the period you type in this field. The system limits calculated requirements to the firm planned orders and suggested orders from the MPS due through the end of this period.

MPS Information

Use the screen below to define MPS setup information.

12/23/97	9:24:22	Work	with Entity	MPGENM	MPDENM
		MPS	Information		
Include Ac Activate R Action Mes Pegging Cu Treat Nega Last Plan	tion Messa eschedulin sage Cutof toff Number tive Onhan Number Ass	ges on Summary g Messages f Period r of Days d as Zero igned le less than .	Y (Y=Yes, N=Ñ Y (Y=Yes, N=N _12_ _90_ Y (Y=Yes, N=N 110_	o)	Size)

Figure 2-3: MPS Information screen

MPS Format

This determines how the MPS calculates material requirements.

1 Leveling	The system totals and averages the requirements for all the time periods within the MPS schedule. The calculated average becomes the suggested reorder quantity for each period.
2 Chase	The system suggests the forecast amount calculated for the time bucket.
3 Lot Size	The system reorders material based on the method you select in the <i>Lot Size Technique</i> field on the Base Application Information screen.

Treat Negative Onhand as Zero

Type \mathbf{Y} in this field if you do not want the MPS to reflect negative beginning inventory balances. This causes the system to set the beginning inventory balance to zero for the MPS calculation, which affects only the MPS calculation, not actual inventory balances.

Type \mathbf{N} to use the negative quantity as the starting inventory.

Suggest when available less than

If you type **1** in this field, MPS suggests a quantity when available inventory falls below zero. The system bases the quantity suggested on the lot size technique. Define the lot size technique for each item in the *Work with Item Warehouse* option in Infinium IC.

If you type **2** in this field, the system suggests a quantity when available inventory falls below the minimum quantity. Define the minimum quantity for each item in the *Work with Item Warehouse* option in Infinium IC.

The system bases the suggested quantity on the lot size technique and this affects the net requirements used in the lot size calculation. The net requirements include the quantity necessary to return the available balance to the minimum.

The system uses the following formula to calculate available inventory for MPS calculations:

Available = *starting inventory* + *MPS* + *firmed planned orders* + *scheduled receipts* - *demand*

The system calculates the demand component in this formula based on the consumption rule you define using the Time Fences attribute.

The action message cutoff is by period and the pegging cutoff is by days.

MRP Information

Use the screen below to define MRP setup information.

12/23/97	9:24:47	Work with Entity	MPGENM	MPDENM
		MRP Information		
Activate Re Action Mess Pegging Cut Explode Cor Treat Negat	tion Messages or escheduling Mess sage Cutoff Peri toff Number of D tainer Bill of D tive Onhand as D available less t	sages Y (Y=Yes, N=No) iod <u>12</u>)ays <u>90</u> Material Y (Y=Yes, N=No) Zero Y (Y=Yes, N=No)	nimum)	
F2=Function	n keys F3=Exit	F10=QuikAccess F12=Cancel	F18=Message	ine I

Figure 2-4: MRP Information screen

Treat Negative Onhand as Zero

Type \mathbf{Y} in this field if you do not want the MRP to reflect negative beginning inventory balances. This causes the system to set the beginning inventory balance to

zero for the MRP calculation. This affects only the MRP calculation, not actual inventory balances.

Type \mathbf{N} to use the negative quantity as the beginning inventory.

Plan when available less than

If you type **1** in this field, MRP suggests a quantity when available inventory falls below zero. The system suggests a quantity based on the lot size technique. Define the lot size technique for each item in the *Work with Item Warehouse* option in Infinium IC.

If you type **2** in this field, the system suggests a quantity when available inventory falls below the minimum quantity. Define the minimum quantity for each item in the *Work with Item Warehouse* option in Infinium IC.

The system suggests a quantity based on the lot size technique and this affects the net requirements used in the lot size calculation. The net requirements include the quantity necessary to return the available balance to the minimum.

The system uses the following formula to calculate available inventory for MRP calculations:

Available = starting inventory - independent demand - dependent demand + receipts + planned order receipts

The action message cutoff is by period and the pegging cutoff is by days.

Time Fences

	111	ne Fences		
lime Fence 1 Information				
Description		TIME FENCE 1		-
Cutoff period		7_		
Consumption Rule		<u>3</u> (1=Forecast,		
			Customer Order	
		4=Customer O	rders plus Fore	ecast)
lime Fence 2 Information				
Description		TIME FENCE 2		-
Cutoff period		<u> 10 </u>		
Consumption Rule		4 (1=Forecast,		
			Customer Order	0110100000
Time Fence 3 Information		4=Customer V	rders plus Fore	ecast/
		TIME FENCE 3		
Description		4 (1=Forecast, 1	2-Custanan And	-
consumption have			Customer Order	
			rders plus Fore	
		T-oustomer o	ruers prus rore	cast/
	- F10=0uil/Ar	cess F12=Cancel	F18=Meesane	ine
E l'unection kego i v Exit			i i v nebbuge	me

Figure 2-5: Time Fences screen

Use this screen to define the consumption rules for the MPS. Time fences are guidelines you establish to note where various restrictions or changes in operating procedures take place. The consumption rule merely tells the schedule how to consume the available inventory.

Cutoff period

The value you type in these fields identifies the last time bucket to include in that time fence.

Defining Forecast Information Controls

		Forecast	: Information		
)efault Fo	recast Type	9	ECST1 +		
Import f	Origin rom		M <u>PINFINIUM</u> 1 0=Commor MPGISS	ı Services, 1=MP	Trf file
List Pos	ted Forecas	precast st st	1 0=Automati Y (Y=Yes, N= Y (Y=Yes, N=		
	n keus E3=	Exit F4=Prompt	F10=QuikAccess	: F24=More keys	

Figure 2-6: Forecast Information screen

Prior to uploading any forecasts you must define some controls in Infinium MP. All fields are available at the entity level, and limited fields are at the company and warehouse levels.

Default Forecast Type

Use this field to establish your valid default forecast type. You can override this when you create forecasts in Infinium MP and when you edit any imported forecasts.

Point of Origin

This field identifies the source application of the data you import. This value defaults into the *Import Forecast* option. This field is for informational purposes only.

Import from

Use this field to identify the normal storage location of the transferred data. This value defaults into the *Import Forecast* option. Type **0** if you transfer the forecast data into Common Services, or type **1** if you transfer the forecast data into the Infinium MP Transfer file, MPPTF.

Import Handler

Use this field to identify the program to run that should retrieve the transferred forecast data and populate the Imported Forecast file, MPPIF.

You need to specify a program name in the *Import Handler* field only if you are using a custom program. If you are not using a custom program, leave this field blank

and the system uses either the MPGICS or MPGISS program. The system determines the program to use by your entry in the *Import from* field.

The value in the Import Handler field defaults into the Import Forecast option.

Delete of Posted Forecast

Use this field to specify how the system should handle the deletion of posted records within the Imported Forecast file, MPPIF.

You may choose to delete records automatically when you post them. To do this, type **0** in this field.

To retain posted records after posting, type 1 in this field. This way you can control when the system deletes records from the Imported Forecast file by using the purge feature.

If you type 0 in the Forecast Import Delete of Posted Forecasts field and \mathbf{Y} in the Forecast Import List Purged Forecast field, the system automatically generates the Imported Forecast Post and Purge report whenever you post forecasts. If you purge forecasts with the previously mentioned settings, the system generates the Imported Forecast Purge report. If you type 1 in the Forecast Import Delete of Posted Forecast field and \mathbf{Y} in the Forecast Import List Posted Forecast field, the system automatically generates the Imported Forecast field and \mathbf{Y} in the Forecast Import List Posted Forecast field, the system automatically generates the Imported Forecast Post report whenever you post forecasts. A sample of these reports is in the "Infinium MP Reports" appendix.

List Posted Forecast

Type \mathbf{Y} in this field if you want the system to print a list of successfully posted forecasts after posting occurs.

List Purged Forecast

Type \mathbf{Y} in this field if you want the system to print a list of successfully deleted forecasts after the purge occurs.

If you access this attribute in the warehouse or company level, the *Forecast Import Point of Origin, Import from*, and *Import Handler* fields are not available.

Press Enter, then F3 and answer the Confirmation window with 1 and Enter to save your entries.

Working with Forecast Descriptions

Use this option to create the forecast descriptions the system uses when you create forecasts. You also specify whether or not the system should include a particular forecast when you generate the MPS.

Use the menu path below.

- Control Files
 - Work with Forecast Description [WWFD]

Forecast Types

Sele	ct recor	rds. T	hen p	ress	Enter				
0pt 2 -	Type FCST1 FCST2	Descr FOREC FOREC	ast t	YPE 1					
									Bottom

Figure 2-7: Work with Forecast Description prompt screen

To create a new forecast description, type the code in the *Forecast Type* field and press F6.

Type any character in the *Opt* field and press Enter to work with an existing forecast type.

Reposition the list of forecast types by typing all or part of a type in the *Forecast Type* field and pressing Enter. The system redisplays the list beginning with the forecast type closest to your entry.

When you change a forecast description, the system updates the Forecast file and the Order Type Default file.

Forecast Descriptions

	:	FCST1 FORECAST_TYPE_1		
F0 F ···	E10 0 110	E10.0	F04 H 1	
s F3=Exit	FIØ=QuikHco	cess FIZ=Cancel	F24=More keys	
			<u>EORECAST TYPE 1</u> <u>Y</u> (Y=Yes, N=No)	EORECAST TYPE 1

Figure 2-8: Work with Forecast Description screen

Type \mathbf{Y} in the *Include in MPS* field to include any forecasts with this forecast type in the MPS. The system also places a \mathbf{Y} in the *Sel* field in the Order Type Default file as shown later in this part.

Type \mathbf{N} to exclude this forecast type. You can override this setting when you generate the MPS.

If you change the *Include in MPS* field to **N** at a later time, you must also make the change in the *Work with Order Type Defaults* option. After the initial set-up, the system does not reflect the change in the Order Type Default file for advanced planning processing.

Press $\boxed{F22}$ to delete a forecast type. If a forecast exists for this type, you cannot delete it until you remove the forecast.

Maintaining Forecasts

Use this option to create forecasts. For each product, specify the forecast dates and the quantities required.

You can include products on more than one forecast.

Use the menu path below.

- Control Files
 - Work with Forecast [WWF]

Type	option, pre Change 4=De	Product . Forecast ss Enter.	nd Warehouse <u>I</u> : 		*
0pt 2 - -	Co Whse IS1 ISW1 IS1 ISW1 IS2 ISW2 IS2 ISW2	Product PRODØ1 PRODØ2 PRODØ3 PRODØ7	Size Type Forecas FCST1 FORECAS FCST1 FORECAS FCST2 FORECAS FCST2 FORECAS	t type 1 t type 1 t type 2	
F2=Fu	nction keys	F3=Exit	F4=Prompt F6=Create F24=Mo	re keys	Bottom

Figure 2-9: Work with Forecast selection screen

To create a new forecast, complete the *Position To* fields and press F6.

Type 2 in the *Opt* field and press Enter to work with an existing forecast.

Reposition the list of forecasts by completing all or part of the *Position To* fields and pressing Enter. The system redisplays the list beginning with the forecast closest to your entry.

To delete a forecast, type **4** beside the forecast and press Enter twice.

Forecast Attributes

12/01/9/	14:55	:11	Work wi	th Forecas	t	MPGMFM	MPDMFM
Company . Warehouse Product . Forecast T Forecast D	 ype	· · · · · ·	· · · · : · · · :	IS1 ISW1 PRODØ1 FCST1 FORECAST	TYPE 1		
Select one	or more	e of the f	ollowing.	Then pres	s Enter.		
1 Forecas 1 User De							
F2=Functio	n keys	F3=Exit	F6=Create	F8=Print	F24=More	keys	

Figure 2-10: Work with Forecast Attribute selection screen

Type any character in the field to the left of the attribute you want to maintain and press \fbox

Forecast Specifics

			IS1		
			ISW1		
			PRODØ1		
	pe		FCST1 FORECAST_TYPE_1		
	scription		FUKECHƏT TYPE T		
Date 7281997	Quantity 10.0000	UM +			
8111997	25.0000	EA			
8251997	25.0000	EA			
9081997	50.0000	EA			
9151997	50.0000	EA			
9221997	50.0000	EA			
9291997	50.0000	EA			
10061997	50.0000	EA			
10131997	50.0000	EA			
10201997	25.0000	EA			
10271997	25.0000	EA			
					More
F2=Functior	n keys F3=Exit	F4=Prompt	F10=QuikAccess	F24=More keys	
	-			0	-

Figure 2-11: Forecast Details screen

Type the forecast dates and quantities to create your forecast. If you complete all the lines on this screen, press the PgDn key for more lines.

UМ

This field defaults to the inventory unit of measure. You can override the default value with any other valid unit of measure. Regardless of the unit of measure you enter here, the MPS reports and displays show the quantities in the inventory unit of measure.

User Defined Fields

Planner Code	Numeric Fields 9	· · · · ·	
г .			
Forecast co	nment 2	· · · · ·	
<u>User Numeria</u> Last quanti:		· · · · ·	
	sed		

Figure 2-12: Work with Forecast User-Defined Fields screen

The system does not include data you type in these fields in any of the standard displays and reports, but stores the information in the MPS data files. Access this information with Infinium Query.

Maintaining Time Buckets

Use this option to establish time bucket (period) ranges the system uses when generating the Master Production Schedule and the Material Requirements Plan.

Use the menu path below.

- Control Files
 - ▼ Work with Time Buckets [WWTB]

	option, hange	press	Enter.		
20	nango			Bucket	
pt	Co	Whse	Planner		
2	IS1	ISW1	PLNR1	BUCK1	
_	ISI	ISW1	PLNR1	BUCK2	
_	ISI	ISW1	PLNR2	BUCK1	
_	ISI	ISWI	PLNR2	BUCK2	
_	ISI	ISWI	PLNR3	BUCK1	
_	ISI	ISW1	PLNR3	BUCK2	
_	IS2	ISW2	PLNR1	BUCK3	
-	IS2	ISW2	PLNR1	BUCK4	
-	IS2	ISW2	PLNR2	BUCK3	
-	IS2	ISW2	PLNR2	BUCK4	
-			/		More
				4=Prompt F6=Create F24	

Figure 2-13: Work with Time Buckets selection screen

To create a time bucket identifier, complete the Position To fields and press F6.

Type **2** in the *Opt* field and press Enter to work with an existing time bucket identifier.

Reposition the list of identifiers by completing all or part of the *Position To* fields and pressing Enter. The system redisplays the list beginning with the time bucket identifier closest to your entry.

The system requires entries in the *Company*, *Planner*, and *Bucket Identifier* fields. Leave the *Warehouse* field blank to create company level time buckets that are used by all warehouses within the company specified.

Time Bucket Attributes

Planner . Bucket Ide			ISW1 PLNR1 BUCK1 Then press Ente	er.	
T	te Information fined Fields				
F2=Functio	n keys F3=Exi	t F10=QuikAce	cess F12=Cancel	F18=Message	ine

Figure 2-14: Work with Time Buckets Attribute selection screen

Type any character in the field to the left of the attribute you want to maintain and press Enter.

Time Bucket Definitions

Warehouse	Company		:	I\$1		
Bucket Identifier Number Calendar Bucket of units UM + or Work 00001 1.0000 DA 2 00002 1.0000 DA 2 00003 1.0000 DA 2 00004 1.0000 DA 2 00005 1.0000 DA 2 00006 1.0000 DA 2 00006 1.0000 DA 2 00006 1.0000 DA 2 00006 1.0000 DA 2 00007 1.0000 DA 2 00008 1.0000 DA 2 00009 1.0000 DA 2 000010 1.0000 DA 2 00010 1.0000 DA 2 00011 5.0000 DA 2	Warehouse .		:	ISW1		
Number Calendar Bucket of units UM + or Work 00001 1.0000 DA 2 00002 1.0000 DA 2 00003 1.0000 DA 2 00004 1.0000 DA 2 00005 1.0000 DA 2 00006 1.0000 DA 2 00006 1.0000 DA 2 00006 1.0000 DA 2 00007 1.0000 DA 2 00008 1.0000 DA 2 00008 1.0000 DA 2 000010 1.0000 DA 2 00010 1.0000 DA 2 00011 5.0000 DA 2 00012 5.0000 DA 2			:	PLNR1		
Bucket of units UM + or Work 00001 1.0000 DA 2 00002 1.0000 DA 2 00003 1.0000 DA 2 00004 1.0000 DA 2 00005 1.0000 DA 2 00006 1.0000 DA 2 00006 1.0000 DA 2 00007 1.0000 DA 2 00008 1.0000 DA 2 00006 1.0000 DA 2 000010 1.0000 DA 2 00010 1.0000 DA 2 00011 5.0000 DA 2	Bucket Iden [:]		:	BUCK1		
00001 1.0000 DA 2 00002 1.0000 DA 2 00003 1.0000 DA 2 00004 1.0000 DA 2 00005 1.0000 DA 2 00006 1.0000 DA 2 00006 1.0000 DA 2 00006 1.0000 DA 2 00007 1.0000 DA 2 00008 1.0000 DA 2 00008 1.0000 DA 2 000010 1.0000 DA 2 00010 1.0000 DA 2 00011 5.0000 DA 2 00012 5.0000 DA 2		Number		Calendar		
00002 1.0000 DA 2 00003 1.0000 DA 2 00004 1.0000 DA 2 00005 1.0000 DA 2 00006 1.0000 DA 2 00006 1.0000 DA 2 00006 1.0000 DA 2 00006 1.0000 DA 2 00008 1.0000 DA 2 00009 1.0000 DA 2 00010 1.0000 DA 2 00011 5.0000 DA 2 00012 5.0000 DA 2	Bucket	of units	UM +	or Work		
000003 1.0000 DA 2 00004 1.0000 DA 2 00005 1.0000 DA 2 00006 1.0000 DA 2 00007 1.0000 DA 2 00008 1.0000 DA 2 00008 1.0000 DA 2 00008 1.0000 DA 2 00009 1.0000 DA 2 00010 1.0000 DA 2 00011 5.0000 DA 2 00012 5.0000 DA 2	00001 .	1.0000	DA			
000003 1.0000 DA 2 00004 1.0000 DA 2 00005 1.0000 DA 2 00006 1.0000 DA 2 00007 1.0000 DA 2 00008 1.0000 DA 2 00008 1.0000 DA 2 00008 1.0000 DA 2 00009 1.0000 DA 2 00010 1.0000 DA 2 00011 5.0000 DA 2 00012 5.0000 DA 2	. 00002	1.0000	DA	2		
	. 00003	1.0000	DA	2		
	. 00004	1.0000	DA	2		
	. 00005	1.0000	DA	2		
	. 00006	1.0000	DA	2		
	. 00007	1.0000	DA	2		
	. 80000	1.0000	DA	2		
	. 00009	1.0000	DA	2		
	00010 .	1.0000	DA	2		
	00011 .	5.0000	DA	2		
More	00012 .	5.0000	DA	2		
						More
F2=Function keys F3=Exit F4=Prompt F6=Create/Update F24=More keys	F2=Function	keys F3=Exit	F4=Prompt	F6=Create/Update	F24=More keys	
		-			-	

Figure 2-15: Work with Time Buckets screen

Establish time buckets in units of measure that the system can convert to the unit of measure you typed in the *Days Unit of Measure* field in the *Work with Entity* option. For example, 1 Week can be converted to 5 Days, and 1 Mnth can be converted to 30 Days.

To further illustrate, if you type **6** in the *Number of units* field and **Mnth** in the *UM* field, where **Mnth** is equal to 30 days, as defined in Infinium CA, the system calculates 180 Days for the time bucket. First, the system converts 1 Mnth to 30 Days, and then multiplies this by the value you typed in the *Number of units* field.

Regardless of whether you choose work days or calendar days, you must first define the working day calendar in the *Work with Calendar* option in Infinium CA.

User Defined Fields

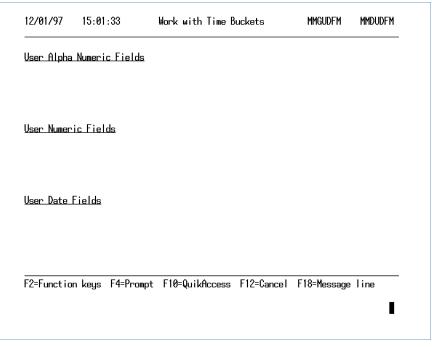


Figure 2-16: Work with Time Buckets User-Defined Fields screen

The system does not include the data you type in these fields in any of the standard displays and reports, but stores the information in the MPS data files. Access this information with Infinium Query.

Working with Order Type Defaults

Use this option to specify which order types to include in the master schedule selection process.

Use the menu path below.

- Control Files
 - ▼ Work with Order Type Defaults [WWOTD]

	on, press Enter.				
1=Selec [.]	t 4=De-select	_	0.1		
	0	Type	Order T	D	
)pt Sel	Co	ID	Type	Description	
-		CORD	AMZ1	TONI'S OP ORDER TYPE #1	
-		CORD	AMZ1	TONI'S OP ORDER TYPE #1	
-		CORD	BLS	Beth's Pick/Ship	
-		CORD	CRM	Credit Memo	
_		CORD	CRM	Credit Memo	
_		CORD	DBM	DEBIT MEMO	
_		CORD	DRM	Debit Memo	
_ Y		CORD	FUT	FUTURE ORDER	
_ Y		CORD	FUTUR	Future order	
_		CORD	INFCM	INF Credit Memo	
ī		CORD	INFFT	INF Future Order	
-					More

Figure 2-17: Work with Order Type Defaults selection screen

This file consists of all the order types from:

- Infinium OP
- Infinium PM
- Infinium MC
- Forecasts in Infinium MP

Type **1** in the *Opt* field for each order type you want to include and press $\boxed{\text{Enter}}$. The system displays **Y** in the *Sel* field for each order you select. Type **4** in the *Opt* field beside previously selected order types you want to exclude.

Regardless of your selections here, you can override these order types when you generate the MPS.

Recalculating Low Level Codes

The system uses Low Level codes during MRP generation to reduce the processing time. The Low Level code identifies the lowest level in any formula/bill of materials at which a material appears.

You must run the recalculation for all formulas at least once. Thereafter you should determine which formulas need recalculating when, based on your extent of formulation changes.

During processing, at each level of the formula/bill of materials that a material is used, the system accumulates requirements passed from the MPS and/or its parent item. The system maintains a running total until the level being processed matches the material's Lowest Level code. At that point, the system calculates all requirements and receipts and the netting process determines if you need planned orders.

Use the menu path below.

- Control Files
 - Recalculate Low Level Codes [RLLC]

11/25/02	14:55:03	Recalculate	e Low Level	Codes	MPGLLR	MPDLLR
Type option 1=Select	n, press Enter	·.				
Opt _ Recalc	ulate for all	Formulas				
_ Recalc	ulate for Plar	1 ID		- +		
- Compa Warel Form	ulate for Form any nouse ula Code	· · · · · · ·	<u>CUSDA</u> + <u>CWAC1</u> + +		_ +	
F2=Function	n keys F3=Exi	t F4=Prompt	F8=Submit	F24=More	keys	

Figure 2-18: Recalculate Low Level Codes screen

Select *Recalculate for Plan ID* to include all formulas for the products included in the Plan ID you type.

If you have multiple instances of a formula and have the proper authority, the *Company* and *Warehouse* fields display. You can specify the instance of the formula to recalculate by specifying a value for *Company* and *Warehouse* in *Recalculate for Formula*. To specify a company formula, leave *Warehouse* blank. To specify an entity formula, leave both *Company* and *Warehouse* blank.

Within each level, the system checks the effective dates for a formula instance against the system date to determine which formula instance to use.

FBE Code

Specify the FBE code of the formula instance for which you want to recalculate low level codes.

Type 1 in the *Opt* field next to the desired option and press F8 to begin processing.

Defining User Selections

Define how the Demand Fulfillment Workbench displays by user through the *Work* with User Selections option in Infinium CA.

Use the menu path below.

- Control Files
 - ▼ Work with User Selections [WWUS]

Posi	tion to	. Sequence	e <u>00000</u>					
	options, p Change	ress Enter.						
0pt - - 2	Work with Work with Work with	on Products Item Waref Raw Materi Non-Invent MP Workber	als :ory	Seque 00001 00002 00003 00004 00005				
								Bottom
F2=F	unction key	∣s F3=Exit	F10=Quikf	lccess	F18=Message	line	F22=Delet	e

Figure 2-19: Work with User Selections selection screen

Type **2** beside Work with MP Workbench and press Enter to define defaults for the Demand Fulfillment Workbench.

The Work with MP Workbench selection only displays if \mathbf{Y} is in the *Use Advanced Planning*? field on the Base Application Information screen in the Infinium CA Entity Control file, and if **S2K** is in the *Advanced Planning* field in the Infinium CA Entity Control file.

Defining MP Workbench Defaults

	•		PJT Work with MP Work!	pench	
	nat vel		1 (1=Message ID, 2 3 (1=MPS, 2=MRP, 3		3=Formula)
Buyer Code Product Fa	ctions by de e mily/Class . Code		<u> </u>		
F2=Function	keys F3=Exit	F4=Prompt	F7=Clear Defaults	F24=More	keys

Figure 2-20: Work with User Selections MP Workbench screen

Use this screen to determine the defaults for the Demand Fulfillment Workbench. You can override these defaults in Infinium MP.

Display Format

Use this field to determine if the Demand Fulfillment Workbench displays by **1** (Message ID), **2** (Product), or **3** (Formula). If you leave this field blank, the system displays the workbench by Message ID.

Planning level

Use this field to determine the type of messages you want to display in the Demand Fulfillment Workbench. Type 1 for MPS messages only, 2 for MRP messages only, and 3 for both. If you leave this field blank, the system displays both MPS and MRP messages in the workbench.

Press Enter to accept these entries.

Checks to Perform Prior to Generating MPS and MRP Plans

Be sure you define the following fields and options appropriately before you use Infinium MP. Remember that to generate a MPS or MRP plan, you need to have demand requirements on the system (manufacturing usage and orders) and a supply of inventory (beginning balances plus purchase order receipts and manufacturing production). You must also have formulas in Infinium PF.

Infinium CA

Menu Level	Options	Specifics
Control Files	Work with Entity Controls	In the Entity Control file on the Base Application Information screen, set the Use Advanced Planning field to Y. On the System Information screen, you must indicate that Advanced Planning is S2K. Also, indicate you use the Available to Promise display on the Available to Promise screen.
Control Files	Work with User Selectic	ons This is optional. Define defaults for the Demand Fulfillment Workbench via the Work with MP Workbench attribute within the Work with User Selections option.
Code Files	Work with Calendar Work with Lead Time Control	The system uses the calendar in conjunction with time buckets. Using the <i>Work with Lead Time Control</i> option, you must complete the MPS and MRP columns.
Master Files	Work with UM Conversion	You must define the Day unit of measure in the Unit of Measure Conversion file.

Menu Level	Options	Specifics
Master Files	Work with Item Warehouse File (also in Infinium IC)	In the Item Warehouse file, you must plan how you define fields that the system may use with Infinium MP.
	Or you can access this through Work with Raw Material/Resource or Work with Products	Infinium MP uses the following fields on the General Information screen: <i>Daily</i> <i>Capacity, Daily Capacity Unit of Measure,</i> <i>Order Strategy, MPS Format, Lot Size</i> <i>Technique,</i> and <i>Critical Resource.</i>
		The Daily Capacity, Daily Capacity Unit of Measure, and Critical Resource fields are not mandatory. In Infinium MP, set defaults in the Control files for MPS Format and Lot Size Technique.
		On the second Inventory Information screen, Infinium MP checks the quantity fields depending on your lot size technique.
		• If you use the fixed order quantity technique, the system requires entries in the Order Policy/Lot Size Quantity and Order Multiple Quantity fields.
		• If you use lot for lot with min/max, then the system requires entries in the Order Policy/Lot Size Quantity, Minimum Quantity, and Maximum Reorder Quantity fields.
		You also must define the <i>Automatic</i> <i>Creation Method</i> field to determine if the system automatically creates needed batches or sends them to a Work file. This also controls whether the system automatically creates purchase requisitions for needed items or sends them to a Work file.
		On the Lead Times screen, the system uses the fields you indicated on the lead time matrix in the <i>Work with Lead Time Control</i> option.

Menu Level	Options	Specifics
Control Files	Work with Inventory Type File	Define the MPS/MRP column so Infinium MP can determine supply and demand. This is only for the Product Requirements report and display. The system determines supply and demand for the Master Production Schedule and the Material Requirements plan by the order types you include. You must define the Available to Promise display column also.

Additional Items You Must Define in Infinium MP

- 1 All fields within the Infinium MP Entity Control files. This includes settings for the following:
 - lot size technique
 - planning horizons
 - time fences
- 2 Forecasts, if you plan to use them, in the *Work with Forecast Description* and *Work with Forecast* options in the Infinium MP Control files.
- 3 Time buckets in the Work with Time Buckets option in the Infinium MP Control files.
- 4 You must select order types, if you plan to use them on MPS/MRP, in the *Work with Order Type Defaults* option in the Infinium MP Control files.
- 5 You must run the *Recalculate Low Level Codes* option for all formulas at least once. This option is in the Infinium MP Control files.

Part 3 Master Production Scheduling

3

The part consists of the following topics:	
Торіс	Page
Overview of Master Production Scheduling	3-2
Master Production Schedule Generation Selection	3-3
Authorizing the Master Schedule	3-11
Maintaining the Master Production Schedule	3-13
Displaying the Master Production Schedule	3-21
Printing the MPS Exception Report	3-24

Overview of Master Production Scheduling

The Master Production Schedule (MPS) represents a time-phased planning tool using planned and firm quantities of supply, demand, and inventory balances for each of the items you specify. The system derives supply and demand from multiple sources including Infinium IC, Infinium OP, Infinium MC, Infinium PM, and manual forecasts you create in Infinium MP.

The system allows you to define multiple plans, each containing different assumptions and yielding different MPS results. This feature allows you to create master production schedules based on different criteria providing "what-if" scenarios.

After you complete this part, you should be able to:

- Generate and maintain a master production schedule
- Display a master production schedule
- Print a master production schedule exception report

Master Production Schedule Generation Selection

Use this option to create a new MPS plan or to modify an existing plan. You cannot include raw materials on a MPS plan.

Use the menu path below.

- Master Production Scheduling
 - ✓ MPS Generation Selection [MPSGS]

			ess Enter. opy 4=Dele	ete 6=	Print	Select	tion C	riteria			
	on ang		-pg			00100			Generation	n Author	ized
0pt	Co	Whse	Plan ID	Descri	ption				Flag	MPS	
2	IS1	IS₩1	107	PLAN D	ESCRIF	'TION	107		Ϋ́	Y	
_	ISI	IS₩1	108	PLAN D	ESCRIF	TION	108		Y	Ν	
_	IS2	IS₩2	109	PLAN D	ESCRIF	'TION	109		Y	Y	
_	IS2	IS₩4	110	PLAN D	ESCRIF	TION '	110		Y		
										Во	ottom

Figure 3-1: MPS Generation Selection screen 1

To define a new set of MPS selection criteria, complete the *Company* and *Warehouse* fields and press F6. The system automatically assigns the Plan ID by adding 1 to the value stored in the *Last Plan Number Assigned* field in the Infinium MP Warehouse, Company, or Entity Control file.

Create a plan with multiple warehouses by pressing $\boxed{F4}$ with the cursor positioned in the *Warehouse* field. Select the warehouse to include in the plan from the MPS Generation selection screen 1. If you specify multiple warehouses, you must identify the controlling warehouse at the top of the MPS Generation selection screen 2.

Type **2** beside an existing plan and press Enter to go to the MPS Generation Selection screen 2.

If you type **6** beside an existing plan and press Enter, plan selection criteria prints.

If there is a \mathbf{Y} in the *Generation Flag* field, the plan identified by the company, warehouse, and plan identifier to the left of the flag has been generated.

MPS Generation Specifics

Companu .		:	I\$1		
	s)		ISWI		
	ifier		000000107		
lan Descr	iption		PLAN DESCRIPTION	107	_
	Product				
Ending Pro	duct				
) lanner(s)			+		
Product Fa	mily(s)		+		
Gummary On	ly		N (Y=Yes, N=No)		
Start Date			<u>12011997</u>		
Number of	Buckets		12		
Gross Dema 2 Cus	tomer Orders ecasts		Scheduled Receipt 1 Scheduled 1 Purchase (1 Requisitic	Production)rders	
F2=Functio	n keys F3=Exi	t F4=Prompt	F6=Create/Update	F24=More keį	js ∎



If you type a product in the *Beginning Product* field and do not type one in the *Ending Product* field, the plan will only be for the one product.

If you select both *Planner(s)* and *Product Family(s)*, both have to match the entries in the Item Warehouse file before the system includes any product in the MPS selection.

Planner(s)

If you type a valid code in this field, the system only selects products with the specified Planner code in the product's Item Warehouse record for the MPS. You can specify more than one planner for the MPS selection by pressing F4 and selecting them. If you select more than one Planner code, the system displays **More..** to the right of this field.

To remove a single selection, field exit through the *Planner(s)* field. To remove multiple selections, you must prompt on the *Planner(s)* field and deselect the codes you wish to remove.

Product Family(s)

If you type a valid code in this field, the system only selects products with the Product Family code in the product's Item Warehouse record for the MPS. You can specify more than one product family for the MPS selection by pressing [F4] and selecting them. If you select more than one Product Family code, the system displays **More..** to the right of this field.

To remove a single selection, field exit through the *Product Family(s)* field. To remove multiple selections, you must prompt on the *Product Family(s)* field and deselect the codes you wish to remove.

Summary Only

If you type \mathbf{N} in this field, the system adds to the summary total, for each product on the MPS, the order detail from:

- Infinium OP
- Infinium PM
- Infinium MC
- Manual Forecasts created in Infinium MP

If you type \mathbf{Y} in the *Summary Only* field you do not create plan detail. This detail will not be accessible for any reports or inquiries based on this plan. This plan will also not be available in the Demand Fulfillment Workbench. You have to regenerate the plan with an \mathbf{N} in the *Summary Only* field in order to create detailed data.

Number of Buckets

The number you type in this field cannot exceed the number of buckets in the time bucket definition the system uses for this plan.

Gross Demand, Scheduled Receipts

Use the fields at the bottom of the screen to accept or override selections made in the *Work with Order Type Defaults* option. Type **1** beside the type of demand and receipt to include. The system uses the default order types specified in the *Work with Order Type Defaults* option.

To override the default order types, type **2** in the field to the left of the type you wish to override and press Enter. The system displays the window shown below containing the valid order types for each of the gross demands and scheduled receipts you select. The overrides stay in place for this plan.

The system uses the date you type in the *Start Date* field on the MPS Generation selection screen 2 as the date of the first time bucket.

MPS Order Type Selections

Plan Id Plan De	0n	der Type Defa	ul+ ∩u	oppido		
Beginni	Position to			ennue		
Ending	1=Select	4=De-select				
lanner	1 VOICEC	Type				
Product	Opt Sel Co	ID	Type	Description		
Summary		CORD	AMZ1	TONI'S OP ORD	er type #1	
Start D	_	CORD	BLS	Beth's Pick/S	hip	
Number	_	CORD	CRM	Credit Memo	•	
	_	CORD	DBM	DEBIT MEMO		
l=Selec	_	CORD	DRM	Debit Memo		
Gross D	_ Y	CORD	FUT	FUTURE ORDER		
2	_ Y	CORD	FUTUR	Future order		
1	-	CORD	INFCM	INF Credit Me	mo	
1						More
			kAcces	s F12=Cancel	F18=Message	line
	Invalid func	tion key.				

Figure 3-3: Order Type Default Override Window

Type **1** in the *Opt* field to the left of each order type you want to use for this MPS generation and press Enter. Type **4** to exclude any previously selected order types. Your selections pertain to this MPS run only and do not change the permanent settings.

Press Enter to save your changes and close the window.

You have two options for completing the selection process:

- Press F6 (Create/Update). In this case, the system saves your changes to the MPS selection criteria to use the next time you generate the MPS.
- Press F8 (Generate). This option saves the changes you have made and generates a new MPS. In addition, you must specify the time bucket identifier to use for this MPS generation. If you must regenerate a plan, be aware that the system replaces the data for the original plan when you regenerate a plan.

MPS Time Bucket Selection

Warehou			Time Bu	icket Sel	ection		
Plan Id Plan De Beginni Ending				lanner _	<u>IS1</u> + Warehouse + Bucket Id		
Planner Product					Bucket		
Summary	Sel	Co	Whse	Planne			
Start D	1	ISI	ISW1	PLNR1	BUCK1		
Number	-	ISI	ISW1	PLNR1	BUCK2		
		IS1	IS₩1	PLNR2	BUCK1		
1=Selec		IS1	IS₩1	PLNR2	BUCK2		
Gross D	_	IS1	ISW1	PLNR3	BUCK1		
2	_	IS1	IS₩1	PLNR3	BUCK2		
2 2 1	_	I\$2	IS₩2	PLNR1	BUCK3		
1	-	IS2	IS₩2	PLNR1	BUCK4		
						More	
	F2=Fur	nction	keys F4	=Prompt	F24=More keys		
F2=Func							S

Figure 3-4: Time Bucket Selection window 1

Type any character in the *Sel* field to select the time bucket identifier you want the system to use in the MPS generation process. You must select a time bucket every time you generate a plan.

After making your selection, press Enter. The system then displays the second Time Bucket Selection Window.

Overriding Time Buckets

Company Warehou	Time Bucket Selection	
Plan Id		
Plan De	Company : IS1 Warehouse : ISW1	
Beginni	Planner : PLNR1 Plan ID : 000000107	
Ending	Bucket Identifier . : BUCK1	
Planner		
Product	Number Calendar	
Summary	Bucket Date of units UM + or Work	
Start D	00001 12/01/1997 <u>1.0000 DA</u> 2	
Number	00002 12/02/1997 <u>1.0000 DA</u> 2 00003 12/03/1997 1.0000 DA2	
1=Selec	00003 12/03/1997 <u>1.0000 DA</u> 2 00004 12/04/1997 <u>1.0000 DA</u> 2	
Gross D	00005 12/05/19971.0000 DA 2	
	00002 12/02/1997 1.0000 DA 2 00003 12/03/1997 1.0000 DA 2 00004 12/03/1997 1.0000 DA 2 00005 12/05/1997 1.0000 DA 2 00006 12/08/1997 1.0000 DA 2 00006 12/08/1997 1.0000 DA 2 00006 12/09/1997 1.0000 DA 2 00008 12/10/1997 1.0000 DA 2	
2 2 1	00007 12/09/1997 <u>1.0000</u> DA2	
1	00008 12/10/1997 <u>1.0000</u> DA 2	
-	More	
	F2=Function keys F4=Prompt F24=More keys	
F2=Func		s
		-

Figure 3-5: Time Bucket Selection window 2

You can override any of the default information. The changes you make are for this MPS run only.

Press F8 to access the Print Selection window.

Print Selections

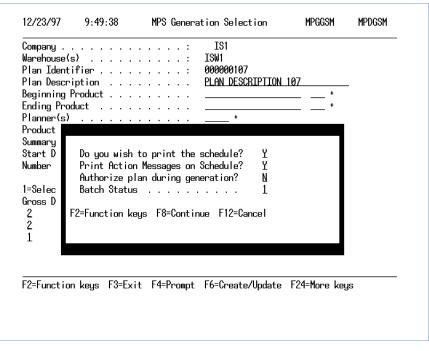


Figure 3-6: Print Selection window

To print, type **Y** in either of the first two fields and press F8 to process.

The Authorize plan during generation? field defaults to **N**. If you type **Y**, you can automatically create purchase requisitions or manufacturing batches while you generate the plan. This field combines plan generation and authorization into one step and allows the user to have the system automatically create requisitions or batches during the plan's generation.

If the *Authorize plan during generation?* field is **Y**, the system searches for any item on this MPS in the Item Warehouse file with an *Automatic Creation Method* field value of **1**. If such items exist, when you generate the plan the system creates either a single line item on an Infinium PM requisition for each item or a batch in Infinium MC. The system uses the suggested MPS quantity.

If you use automatic requisition creation and the system finds a suggested quantity of **0**, it does not create a requisition line item.

In addition, if the *Authorize plan during generation*? field is \mathbf{Y} and lot control is enabled, the system creates a lot number when the plan is generated. If your controls are set up to assign the lot number based on the manufacturing batch number, the manufacturing batch number is used as the lot identifier. If your controls are set up to automatically generate a lot number, the system assigns the next available lot number for the lot identifier.

The *Batch Status* field determines the stage of the batch that Infinium MP automatically creates. Batches can be **0** for Firm Planned, **1** for Scheduled, or **2** for

Work in Process. The system defaults a value in this field from the Infinium MP Entity Control file.

Authorizing the Master Schedule

Use this option after you create and review the MPS plan. You must authorize the plan before you can maintain it using the *Maintain MPS* option. Authorization permits you to create requisitions and batches for production planning. If you do not schedule batches or create purchase requisitions using this option, you do not need to authorize the plan.

Use the menu path below.

- Master Production Scheduling
 - Master Schedule Authorization [MSA]

	optio Author		ess Enter. 4=Remove Au	uthorizat	ion			
•	nachor	120					Author	i zed
0pt	Co		Plan ID		iption		MPS	
_		IS₩1	107	Plan	DESCRIPTI	ON 107	Y	
_		IS₩1	108	Plan	DESCRIPTI	ON 108	Ν	
_		IS₩2	109		DESCRIPTI		Y	
_	182	IS₩4	110	Plan	DESCRIPT	ON 110		
								Bottom

Figure 3-7: Master Schedule Authorization screen

When you regenerate a plan, the system removes the authorization and you must reauthorize the plan prior to additional maintenance.

You can authorize only one plan per company.

If lot control is enabled and you create a batch through this function, the system creates the lot number when the batch is created. If your controls are set up to assign the lot number based on the manufacturing batch number, the Plan ID is used as the lot identifier. If your controls are set up to automatically generate a lot number, the system assigns the next available lot number for the lot identifier.

Maintaining the Master Production Schedule

This option displays, by product or formula, the requirements identified by the generation of the MPS. You can also create production orders in Infinium MC and purchase requisitions in Infinium PM.

Use the menu path below.

- Master Production Scheduling
- Maintain MPS [MMPS]

Figure 3-8: Maintain MPS prompt screen

Press F4 on the *Plan Identifier* field for the system to display a list of all authorized plans from which to choose. The *Number of Buckets* field automatically fills in, but you can override it with a number that is less than the total buckets allowed for that plan.

MPS Selection Screen

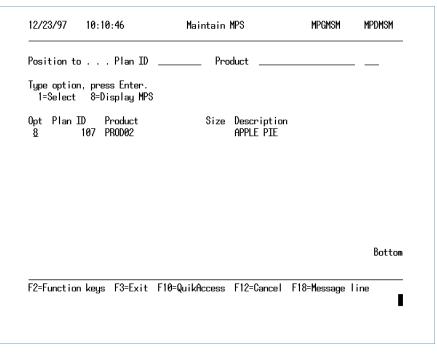


Figure 3-9: Maintain MPS selection screen

If you chose product as the type of display, the system displays each product included in the MPS. If you chose formula, the system displays all formulas required by the MPS. Where there are multiple products made from the same formula, the system combines individual quantities and breaks out the individual products when you schedule the batch or create a purchase requisition.

Type **8** in the *Opt* field to display the MPS for a product. The display screens are shown on the next two pages. Type **1** in the *Opt* field to maintain the MPS for the product or formula.

Displaying MPS Data

The screen below displays when you type **8** next to a Plan ID and press Enter from the Maintain MPS selection screen.

Plan ID :	107	Product : PROD03	2	
	past due	12/01/1997 12. 1	/02/1997 2	12/03/1997 3
Forecast Orders		50.0000	_	-
Receipts Usage Firm Plann	12.0000			
Available	12.0000			
Plan ATP		50.0000		
Suggested		38.0000		More
F2=Function keys	F3=Exit	F7=Header F10=QuikAccess	F12=Cancel	

Figure 3-10: Display Master Production Sched screen

The system displays the summary portion of the MPS. Use the PgUp and PgDn keys to move the screen to display the remaining time buckets.

The system displays the MPS header screen when you press F7.

Press Help or F1 on the row headings to view an explanation of how the system calculates each category of information. Refer to the "Calculations" appendix for more information.

MPS Detail

Plan ID : 0000001	07	PL	AN DESCRIF	TION 107
Company : IS1		₩a	rehouse .	: ISW1
Product : PROD02		AP	PLE PIE	
ormula : FORM03		RE	GULAR FORM	IULA 3 - APPLE PIE
lanner	F	PLNR1 PI	anner One	
Product Family	F	PCL01 PR	oduct clas	SS CODE 1
Starting Inventory				
nventory Unit of Measure		EA .		
Gafety Stock				
Standard Batch Size		100	.0000	
.ead Time	:	3.00		
ot Size	:			
ot Size Technique	: 1	l Lot-fa	r-lot	
rder Multiple Quantity .	:			
ictual Generation Date .	: 1	12/22/199	7	
Actual Generation Time .	: 1	12:54:41		
ime Fence 1 periods 7	Consumption	Rule 3	Greater o	of Cust Ord/Forecast
ime Fence 2 periods 10	Consumption	Rule 4	Customer	Order plus Forecast
	Consumption	Rule 4	Customer	Order plus Forecast
	F10=QuikAcce	E12-	Campal	

Figure 3-11: MPS header screen

This screen shows the controls used in generating the MPS displayed above.

Maintaining a MPS

The system displays this screen when you type **1** in the *Opt* field on the MPS selection screen.

		Plan ID Period num press Enter.		Product —	PRODØ2		
1=	Select		Unit of				
0pt 1 -	Period 00001 00011	Suggested Qty 38.0000 50.0000	Measure EA	Schedu I ed	Qty O	verage Qty	Maint
		keys F3=Exit F					Bottom

Figure 3-12: Schedule Batches/Create Requisitions selection screen

Type **1** in the *Opt* field to work with a suggested quantity; then press $\boxed{F13}$ (Schedule Batch) to schedule a batch in Infinium MC for manufactured products or $\boxed{F14}$ (Create Reqs) to create a requisition in Infinium PM for purchased products.

If you are working with a formula used to make multiple products, the suggested quantity is sufficient to meet the needs for all product requirements. The batch the system creates is for the suggested quantity with the fill instructions set to the products and quantities calculated by the MPS.

If you are working with a purchased product, the system displays the Requisition Creation screen when you press [F14].

If you are working with a formula, the system displays the Batch Creation screen when you press F13.

You can create a requisition for manufactured products, and a purchased product can have a batch created for it as long as a formula is attached to the product record. Access products through the *Work with Products* option in either Infinium CA or Infinium PF.

A \mathbf{Y} in the *Maint* column indicates that an item has had a requisition or a batch created for it, and this item is no longer available for maintenance.

You cannot continue to the Requisition Creation or Batch Creation screens unless you are using Infinium PM or Infinium MC.

Creating Requisitions

The system displays this screen when you press F14 on the Schedule Batches/Create Requisitions selection screen.

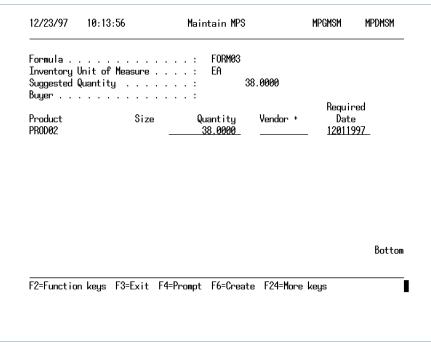


Figure 3-13: Requisition Creation screen

Quantity

The system defaults the MPS quantity into this field. You can override this quantity.

Vendor

This field defaults from the Item Warehouse file *Primary Vendor* field in Infinium IC.

If in the Item Warehouse file a sole vendor exists for an item, you must remain with that vendor in this option. You will not be able to override the Vendor code.

Required Date

This required field defaults to the system date. You can override this date if needed.

Press F6 to create the purchase requisitions. The system creates requisitions that have a requisition type of APS.

Before you can create requisitions, you must create a special requisition type control in Infinium PM as follows:

- Type **APS** in the *Requisition Type* field.
- Type **P** in the *Requisition code* field (on the Requisition Type header screen).

- Type 1 in the *Generation of Req* # field (on the Requisition Type header screen).
- Fill in the remaining fields as appropriate.
- The advanced planning user must have authorization in Infinium PM to create requisitions.

Creating Batches

The system displays this screen when you press F13 on the Schedule Batches/Create Requisitions selection screen.

Inventory (Suggested (Scheduled (: M: Quantity: Quantity	EA	50.0000	Standard Bat	AR FORMULA 3 - tch Size ickets <u>1</u>	100.0000
Fill Produc PROD02	ət	Fill	Quantity 50.0000	-		
F2=Function	n keys F3=Exit	F6=Cr	eate F10:	=QuikAccess	F24=More keus	Bottom

Figure 3-14: Batch Creation screen

Formula

If you have multiple instances of a formula, the system displays the instance of the formula used. If the plan has multiple warehouses, the system uses the controlling warehouse when searching the formula hierarchy to obtain the instance of the formula.

Scheduled Quantity

Type a quantity equal to the batch size you want to create in this field.

Number of tickets

To create multiple batches of the size you indicated in the *Schedule Quantity* field, type the number of batches in the *Number of Tickets* field. The system creates that

number of batches of the same quantity, with each batch having its own unique batch number.

Status

Using this field, you can assign the following initial codes:

- 0 Firm Planned
- 1 Scheduled
- 2 Work in Process

Remember you can use the Demand Fulfillment Workbench to work with MPS inventory problems.

If lot control is enabled and you create a batch through this function, the system creates a lot number when the plan is generated. If your controls are set up to assign the lot number based on the manufacturing batch number, the *Plan ID* is used as the lot identifier. If your controls are set up to automatically generate a lot number, the system assigns the next available lot number for the lot identifier.

Displaying the Master Production Schedule

Use this option to display the MPS summary information for a product or material. Use the menu path below.

- Master Production Scheduling
 - Display Master Production Sched [DMPS]

Posi	tion to	. Plan ID		Pro	duct			- *
	option, pr Select	ess Enter.						
0pt 1	Plan ID 107			Size	Descriptio APPLE PIE	n		
								Bottom
F2=F	unction keu	js F3=Exit	F4=Prompt	F10=	QuikAccess	F18=Message	line	

Figure 3-15: Display Master Production Sched selection screen

Type **1** in the *Opt* field and press Enter to display the MPS for a product or material.

Reposition the selection list by typing all or part of a Plan ID or Product and press Enter. The system redisplays the selection list beginning as close to your entry as possible.

MPS Summary

Plan ID	: 107	Product :	PRODØ2	
	past due	12/01/1997 1	12/02/1997 2	12/03/1997 3
Forecast Orders		50.0000		
Receipts Usage Firm Plann	12.0000			
Available	12.0000			
Plan ATP Summented		50.0000 38.0000		
Suggested		50.0000		More
F2=Function ke	eys F3=Exit f	7=Header F10=QuikA	iccess F12=Cancel	

Figure 3-16: Display Master Production Sched summary screen

The system displays the summary portion of the MPS. Use the PgUp and PgDn keys to move the screen to display the remaining time buckets.

The system displays the MPS header screen when you press F7.

Press Help or F1 on the row headings to view an explanation of how the system calculates each category of information. Refer to the "Calculations" appendix for more information.

MPS Detail Information

Product Family Po Starting Inventory	Warehouse : ISW1 APPLE PIE REGULAR FORMULA 3 - APPLE PIE _NR1 Planner One CL01 PRODUCT CLASS CODE 1
Formula : FORM03 Planner Pl Product Family Pl Starting Inventory	REGULAR FORMULA 3 - APPLE PIE NR1 Planner One
Planner	NR1 Planner One
Product Family Po Starting Inventory	
Starting Inventory :	CLØ1 PRODUCT CLASS CODE 1
Starting Inventory :	
Inventory Unit of Measure : Ef	ĥ
Safety Stock	
Standard Batch Size	100.0000
Lead Time	3.00
Lot Size	
Lot Size Technique 1	Lot-for-lot
Order Multiple Quantity :	
Actual Generation Date 12	2/22/1997
Actual Generation Time : 12	2:54:41
Time Fence 1 periods 7 Consumption H	Rule 3 Greater of Cust Ord/Forecast
Time Fence 2 periods 10 Consumption H	Rule 4 Customer Order plus Forecast
Consumption I	Rule 4 Customer Order plus Forecast
F2=Function keys F3=Exit F10=QuikAcces	E12-C

Figure 3-17: MPS header screen

This screen shows the controls and parameters used in generating the MPS shown on the previous page.

Printing the MPS Exception Report

Use this option to create exception reporting on MPS plans previously generated using the *MPS Generation Selection* option discussed earlier in this part.

Use the menu path below.

- Master Production Scheduling
 - ▼ *MPS Exception Reporting* [MPSER]

Sele	ct one	or mo	re of	the fo	ollowing. Then press Ente	·.	
0pt 1 - -	IS1 IS1 IS2	Whse ISW1 ISW1 ISW2 ISW2	Plan	ID 107 108 109 110	Description PLAN DESCRIPTION 107 PLAN DESCRIPTION 108 PLAN DESCRIPTION 109 PLAN DESCRIPTION 110	Author i zed MPS Y N Y	
						Botto	JM

Figure 3-18: MPS Exception Reporting selection screen

Only generated Plan IDs display on this screen.

Type any character in the *Sel* field to select one or more Plan IDs to include on the report. After selecting the plans, press Enter to continue to the next screen.

Exception Reporting

Company	ISI		
Varehouse	ISWI		
Plan Identifier	000000107		
Plan Description	PLAN DESCRIPTION 107		
Beginning Product		+	
Ending Product		•	
Planner	+		
Product Family			
Buyer			
Number of Buckets	_12_		
Summary Only	Y (Y=Yes, N=No)		
Print Action Messages on the Plan .	Y (Y=Yes, N=No)		
Only Select Product with			
Suggested MPS	N (Y=Yes, N=No)		
Past Due Demand/Receipts Available Greater Than Minimum .	N (Y=Yes, N=No) N (Y=Yes, N=No)		
Available Greater Than Maximum .	N. (Y=Yes, N=No)		
Available Less Than Minimum	N (Y=Yes, N=No)		
nvariaure Less man minimum	<u>u</u> (1-165, N-NO7		
F2=Function keys F3=Exit F4=Prompt	F8=Print F24=More ke	115	
E l'anotion nogo i o Exite i i i i ompe		.90	

Figure 3-19: MPS Exception Reporting Definition screen

Type the criteria you want to use in generating this report in the fields above.

Under the heading Only Select Product with, select one or more options.

Press F11 to change the display from product selection to formula selection.

Press F8 to generate the report.

Examples of the MPS Exception reports are in the "Infinium MP Reports" appendix.

The MPS Exception report and the Master Production Schedule report refer to the same listing.

Notes

Part 4 Material Requirements Planning

The part consists of the following topics:	
Торіс	Page
Overview of Working with Material Requirements Planning	4-2
Working with MRP Generation Selection	4-3
Maintaining the MRP	4-6
Displaying the Material Requirements Plan	4-13
Printing the MRP Exception Reports	4-16

Overview of Working with Material Requirements Planning

Material Requirements Planning (MRP) consists of options that use the formula/bill of material, inventory data, and Master Production Schedule (MPS) to calculate requirements for materials. The system makes recommendations to release replenishment orders for material and to reschedule open orders when due dates and need dates are not in phase.

Time-phased MRP begins with the list of items on the MPS. It determines the quantity of all components and the materials required to produce them and the dates on which you require the components and materials. The system explodes the formula/bill of material, adjusting for inventory quantities on hand or on order, and offsets the net requirements by the appropriate lead times.

After you complete this part, you should be able to:

- Generate and maintain the material requirements plan
- Display material requirements
- Print a material requirements exception report

Working with MRP Generation Selection

Use this option to generate the Material Requirements Plan.

Use the menu path below.

- Material Requirements Planning
 - ▼ MRP Generation Selection [MRPGS]

1=	Select 4	=Delete			Authorized
Opt	Company	Warehouse	Plan ID	Description	MPS
1	IS1	ISW1	107	PLAN DESCRIPTION 107	Y
_	IS1	ISW1	108	PLAN DESCRIPTION 108	Ň
-	IS2	ISW2	109	PLAN DESCRIPTION 109	Ŷ
_	IS2	ISW4	110	PLAN DESCRIPTION 110	
					Bottom

Figure 4-1: MRP Generation selection screen

To generate an MRP, type 1 in the *Opt* field next to the plan you want to process and press F8.

MRP Generation Specifics

Company Warehouse(s) Plan ID		IS1 ISW1 107		
Summary Only Number of Buckets		N (Y=Yes, N=No) _12_		
Planning Horizons Present Cutoff Period . Future Cutoff Period .		<u>7_</u> 12		
Reset Low Level Numbers .		N (Y=Yes, N=No)		
Print the Material Require Print Action Messages on t Automatically Create Reqs/I Batch Status	he Plan . Batches .	Y (Y=Yes, N=No) Y (Y=Yes, N=No) N (Y=Yes, N=No) 1 (0=Firm Planned 2=Work in Proc	·	ed

Figure 4-2: MRP Generation Definition screen

The value you type in the *Number of Buckets* field determines the number of time periods the system includes in the MRP.

The Planning Horizons fields determine the requirements obtained from the Master Production Schedule (MPS).

Present Cutoff Period

Each period up to and including the period you type in this field includes the firm planned order quantities for the material requirements in the MRP.

Future Cutoff Period

Each period beginning with the first period after the present cutoff period and continuing through the period you type in this field includes the firm planned order quantities and the suggested MPS quantities for the material's requirements in the MRP.

Any time buckets after the future cutoff period do not include the requirements from the MPS.

Reset Low Level Numbers

Type \mathbf{Y} in this field for the system to reset the Low Level codes for the formulas included in the MPS plan. This does not affect formulas not included in the selected plan.

If you type \mathbf{Y} in the *Summary Only* field you do not create plan detail. This detail will not be accessible for any reports or inquiries based on this plan. This plan will also

not be available for the Demand Fulfillment Workbench. You have to regenerate the plan with an \mathbf{N} in the *Summary Only* field in order to create detailed data.

Automatically Create Reqs/Batches

The Automatically Create Reqs/Batches field defaults to **N**. If you type \mathbf{Y} in this field, you can automatically create purchase requisitions and manufacturing batches while you generate the plan.

If the *Automatically Create Reqs/Batches* field is **Y**, the system searches for any item on this MRP in the Item Warehouse file with an *Automatic Creation Method* field value of **1**. If such items exist, then when you generate the plan the system creates a purchasing requisition line or a batch for each item. The system uses the suggested MRP quantity.

If you use the automatic requisition creation feature and the system finds a suggested quantity of **0**, the system does not create anything.

The system generates the report after you press F8. The report is at the summary level.

Press F8 to generate a MRP plan.

If you regenerate a plan, the system displays a warning message indicating that this plan was previously generated. If you continue to generate the plan, the system deletes all of the information from the prior plan run and creates a new plan. Press F21 to override the warning and continue with the generation.

Maintaining the MRP

Use this option to display or work with the MRP. You can create batches in Infinium MC or purchase requisitions in Infinium PM.

Use the menu path below.

Material Requirements Planning

Number of E		1 (1=Product, <u>10</u> +	2=Formula)	
		 F10-0 :10	F18=Message	line
	E0_E ''			line

▼ Maintain MRP [MMRP]

Figure 4-3: Maintain MRP prompt screen

Type the identifier in the *Plan Identifier* field or press F4 to display a list of all authorized plans from which to choose. Only authorized plans are available on the selection screen.

Number of Buckets

Type the number of time periods you want to display or print in this field. This number cannot exceed the number of time buckets defined for the plan identifier.

When you have completed this screen, press Enter to continue.

Product/Formula Selection

	e option, pr Select 8=	ess Enter. Display MPS	i			
0pt 8 - - - - - - - - -	Plan ID 107 107 107 107 107 107 107 107 107 107	Product FORM06 RAW01 RAW03 RAW04 RAW05 RAW05 RAW06 RAW07 RAW11 RAW13 RAW19	Size	Description INTERMED-FORM06 WATER BUTTER SUGAR CINNAMON NUTMEG APPLES ABSORBENT PELLENTS RED DYE LABOR	l	Bottom
	unction key	s F3=Exit	F10=QuikAccess	F12=Cancel F18=Me	issage	

Figure 4-4: Maintain MRP selection screen

If you chose to display by product on the previous screen, the system displays each product included in the MRP.

If you displayed by formula, the system displays all formulas required by the MRP. If you have multiple instances of a formula, the system displays the instance of the formula used. If the plan has multiple warehouses, the system uses the controlling warehouse when searching the formula hierarchy to obtain the instance of the formula.

For multiple products made from the same formula, the system combines individual quantities and breaks them out to individual products at the time you schedule the batch or create a purchase requisition.

To display the MRP, type **8** in the *Opt* field and press Enter. To maintain the MRP, type **1** in the *Opt* field and press Enter.

If a formula is on your MRP, the formula and its ingredients display on the above screen. You can create a batch from the formula. The fill will be the formula itself and the ingredients will be the formula's ingredients.

MRP Summary Information

1/02/98	8:18:10	Disp	lay	Material	Require	ments	MPGMRD	MPDMRD
Plan ID	107	Product	Form	06				
				Past	Due	12/01/		12/02/1997
Independent Dependent D Receipts	emand			300	.0000		1	2
Projected A Projected C Planned Orc)nhand			300	.0000-		0.0000- 0.0000	300.0000-
Planned Orc				300	. 0000			More
F2=Functior	ı keys F3=	Exit F1	10=Qu	ikAccess	F7=Hea	der F12	2=Cancel	
								I

Figure 4-5: Display Material Requirements summary screen

The system displays the summary portion of the MRP. Use the PgUp and PgDn to move the screen to display the remaining time buckets.

The system displays the MRP header screen when you press F7.

Press Help or F1 on the row headings to view an explanation of how the system calculates each category of information. Refer to the "Calculations" appendix for more information.

Plan Identifier . : 107 Company : IS1 Product : FORM06	PLAN DESCRIPTION 107 Warehouse : ISW1 INTERMED-FORM06
Actual Generation Date and Time Planner	
Inventory Unit of Measure Starting Inventory Safety Stock	: : 2.00 : : 1 Lot-for-lot : : 20.0000 : 12 Pegging Cutoff Days : 90
F2=Function keys F3=Exit F10=)uikAccess F12=Cancel

Figure 4-6: MRP header screen

This screen shows the controls and parameters used in generating the MRP summary data.

MRP Detail Information

This screen displays when you press **F7** from the Display Material Requirements summary screen.

Batch and Requisition Creation

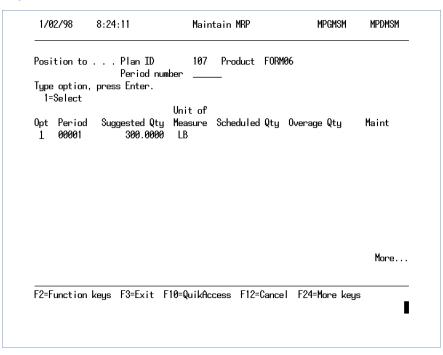


Figure 4-7: Schedule Batches/Create Requisitions selection screen

This is the Schedule Batches/Create Requisitions selection screen. Type **1** in the *Opt* field to work with a suggested quantity. After selecting, press $\boxed{F13}$ (Schedule Batch) to schedule a batch in Infinium MC or $\boxed{F14}$ (Create Reqs) to create a requisition in Infinium PM.

If you are working with a formula used to make multiple products, the suggested quantity is sufficient to meet the needs for all product requirements. The batch the system creates is for the suggested quantity with the fill instructions set to the products and quantities calculated by the MRP.

If you are working with a purchased product, the system displays the Requisition Creation screen when you press [F14].

If you are working with a manufactured product, the system displays the Batch Creation screen when you press $\boxed{F13}$.

You cannot continue to the next screen unless you are using Infinium PM or Infinium MC.

Creating Requisitions

The system displays this screen when you press F14 on the Schedule Batches/Create Requisitions selection screen if the selection is a purchased product.

Suggested	Unit of Measure . Quantity 	:	300.0000		
Product FORM06	Size	 Quantity 300.0000	Vendor + 	Require Date <u>120119</u>	
					Botto

Figure 4-8: Requisition Creation screen

Quantity

The system defaults the MRP quantity into this field. You can override this quantity.

Vendor

This field defaults from the Item Warehouse file *Primary Vendor* field in Infinium IC.

If in the Item Warehouse file a sole vendor exists for an item, you must remain with that vendor in this option. You will not be able to override the Vendor code.

Required Date

This required field defaults to the system date. You can override this date if needed.

Press F6 to create the purchase requisitions. The requisitions the system creates have a requisition type of APS.

Before you can create requisitions, you must create a special requisition type control in Infinium PM as follows:

- Type **APS** in the *Requisition Type* field.
- Type **P** in the *Requisition code* field (on the Requisition Type header screen).
- Type 1 in the *Generation of Req* # field (on the Requisition Type header screen).
- Fill in the remaining fields as you like.
- The Advanced Planning user must have authorization in Infinium PM to create requisitions.

Creating Batches

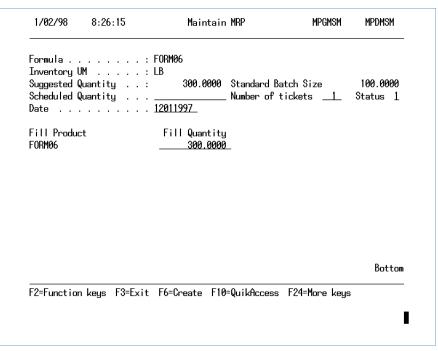


Figure 4-9: Batch Creation screen

If the item you select is a manufactured product the system displays this screen when you press F13 on the Schedule Batches/Create Requisitions selection screen.

Scheduled Quantity

Type a quantity equal to the batch size you want to create in this field.

Number of tickets

To create multiple batches of the size you indicated in the *Schedule Quantity* field, type the number of batches in the *Number of tickets* field. The system creates that number of batches of the same quantity, with each batch having its own unique batch number.

Status

Use this field to assign the following initial Status codes:

- **0** Firm Planned
- 1 Scheduled
- 2 Work in Process

Remember you can use the Demand Fulfillment Workbench to work with MRP inventory problems.

Displaying the Material Requirements Plan

Use this option to display the MRP summary information for a product or material. Use the menu path below.

- Material Requirements Planning
 - Display Material Requirements [DMR]

-						
an ID	Product		Size	Description		
107	FORM06				6	
				Borren		
				01111111111		
					- UTO	
					ENTS	
107	KHWT9			LHBUK		D
						Bottom
	107 107 107 107 107 107 107 107 107 107	107 RAW01 107 RAW03 107 RAW04 107 RAW05 107 RAW06 107 RAW07 107 RAW11 107 RAW13	107 RAW01 107 RAW03 107 RAW04 107 RAW05 107 RAW06 107 RAW07 107 RAW07 107 RAW11 107 RAW13	107 RAW01 107 RAW03 107 RAW04 107 RAW05 107 RAW05 107 RAW06 107 RAW07 107 RAW11 107 RAW13	107 RAW01 WATER 107 RAW03 BUTTER 107 RAW04 SUGAR 107 RAW05 CINNAMON 107 RAW06 NUTMEG 107 RAW07 APPLES 107 RAW11 ABSORBENT PELL 107 RAW13 RED DYE	107 RAW01 WATER 107 RAW03 BUTTER 107 RAW04 SUGAR 107 RAW05 CINNAMON 107 RAW06 NUTMEG 107 RAW07 APPLES 107 RAW11 ABSORBENT PELLENTS 107 RAW13 RED DYE

Figure 4-10: Display Material Requirements selection screen

Type **1** in the *Opt* field and press Enter to display the MRP for a product or material.

Reposition the selection list by typing all or part of a Plan ID or Product and press Enter. The system redisplays the selection list beginning as close to your entry as possible.

Displaying MRP Information

1/02/98	8:27:02	Dis	splay	Material	Requir	rements	MPGMRD	MPDMRD
Plan ID	107	Product	: Rawo	3				
				Past	Due	12/01	/1997 1	12/02/1997 2
Independent Dependent Do Receipts				195.	5850		4.2000	
Projected A Projected O Planned Orde	nhand er Receip			9804. 9804.			0.2150 0.2150	9800.2150 9800.2150
Planned Orde	er Keleas	ē						More
F2=Function	keys F3	≔Exit f	10=Qu	ikAccess	F7=He	eader F12	2=Cance I	

Figure 4-11: Display Material Requirements summary screen

The system displays the summary portion of the MRP. Use the PgUp and PgDn keys to move the screen to display the remaining time buckets.

The system displays the MRP header screen when you press F7.

Press Help or F1 on the row headings to view an explanation of how the system calculates each category of information. Refer to the "Calculations" appendix for more information.

MRP Detail Information

This screen displays when you press F7 on the Display Material Requirements summary screen.

Plan Identi Company . Product .	:	107 IS1 ₩03			N DESCRIPTIO ehouse TER		ISW1
	eration Date			02/1998	8:14:35		
Starting Tr Safety Stoo Lead Time Lot Size Lot Size Te Order Multi Minimum Qua	Init of Measu Iventory . k chnique . ple Quantity antity	· · · · · · ·	· · · · · 2 · · · · 2 · · · · 1	1000.000 .00 Lot-for-lo	-		
	age Cutoff F Prizons Prese			0	ging Cutoff ure Cutoff F	0	
F2=Function	n keys F3=Ex	kit F10=Qu	uikAccess	F12=Canc	el		I

Figure 4-12: MRP header screen

This screen shows the controls and parameters used in generating the MRP shown on the previous page.

Printing the MRP Exception Reports

Use this option to create exception reports on MRPs generated using the *MRP Generation Selection* option discussed earlier in this part.

Use the menu path below.

- Material Requirements Planning
- 1/02/98 MPGMRED 8:31:17 MRP Exception Reporting MPDMRED Position to . . . Company _____ + Warehouse _____ + Plan ID ___ Type option, press Enter. 1=Select Authorized Opt Company Warehouse Plan ID Description MPS 107 PLAN DESCRIPTION 107 1 ISI IS₩1 Y Bottom F2=Function keys F3=Exit F4=Prompt F10=QuikAccess F18=Message line
- ▼ *MRP Exception Reporting* [MRPER]

Figure 4-13: MRP Exception Reporting selection screen

Only generated Plan IDs display on this screen. Type any character in the *Opt* field to select one or more Plan IDs to include on the report.

After selecting the plans, press Enter to continue to the MRP Exception Report prompt screen.

Exception Reporting

Company	TS1	
larehouse	ISWI	
lan Identifier	00000107	
lan Description	PLAN DESCRIPTION 107	
Beginning Product	+	
inding Product	+	
lanner	+	
Product Family	+	
buyer	+	
lumber of Buckets	_12_	
Summary Only		
rint Action Messages on the Plan .	Υ (Y=Yes, N=No)	
only Select Product with		
Planned Order Receipts	N (Y=Yes, N=No)	
Past Due Demand/Receipts	N (Y=Yes, N=No)	
Available Greater Than Minimum .	N (Y=Yes, N=No)	
Available Greater Than Maximum .	N (Y=Yes, N=No)	
Available Less Than Minimum	N (Y=Yes, N=No)	
2=Function keys F3=Exit F4=Promp	t F8=Print F24=More Leus	
	t TO TETHOLE Kega	-

Figure 4-14: MRP Exception Reporting prompt screen

Type the criteria you want to use in generating this report in the fields above.

The system generates the report after you press F8. The report is at the summary level.

Under the column Only Select Product with, select one or more options.

Examples of the MRP Exception report by quantity, production budgeting, and by both are in the "Infinium Advanced Planning Reports" appendix.

The MRP Exception report and the Material Requirements Selection report are the same.

Notes

Part 5 Using the Demand Fulfillment Workbench

5

The part consists of the following topics:

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Overview of Using the Demand Fulfillment Workbench	5-3
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Displaying Information in the Demand Fulfillment Workbench	5-9
Using the Demand Fulfillment Workbench	5-13
Using the Action Codes CBD and CB	5-21
Using the Action Codes CRD and CR	5-23
Using the CD Action Code on Infinium PM Requisitions	5-25
Using the DL Action Code on Infinium PM Requisitions	5-26
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Overview of Using the Demand Fulfillment Workbench

The Demand Fulfillment Workbench provides planners, production control, and materials managers with a central location to manage and correct exception situations for MPS and MRP. Exception examples include new orders that need to be released to satisfy shortages and existing orders that need to be canceled or rescheduled to keep supply and demand balanced.

This workbench allows for swift strategy creation and rapid responses to critical information regarding resources, materials, equipment, and money.

After you set display and authority controls for the workbench, process information through the workbench by selecting an exception situation. Then you correct the situation by using Action codes to perform the applicable processing.

After you complete this part, you should understand and be able to use the Demand Fulfillment Workbench.

Defining Demand Fulfillment Workbench Controls

Setting Infinium CA Demand Fulfillment Controls

The way in which the Demand Fulfillment Workbench displays depends on your settings in the Infinium CA *Work with User Selections* option. The workbench can display by the following:

- Message ID
- Product
- Formula

You can set the workbench to display only MPS or MRP messages, or both. You can also predetermine selections such as a particular Planner, Buyer, Commodity code, or Product Family status.

Regardless of the current display format, you can press F8 from the Demand Fulfillment Workbench selection screen to view the display in a different manner.

You also define controls at the Infinium MP Entity, Company, and Warehouse levels that specify:

- Whether or not you can delete firm planned batches, scheduled batches, or both
- Whether or not deletion of requisitions is allowed

In Infinium CA, define the default views that the system displays in the workbench. Define this information in the *Work with User Selections* option.

Use the menu path below.

- Infinium CA
- Control Files
 - Work with User Selections [WWUS]

.	options, Change	press Enter.			
0pt - - 2	Work with Work with Work with	ion h Products h Item Wareh h Raw Materi h Non-Invent h MP Workber	als ory	Sequence 00001 00002 00003 00004 00005	
					Bottom

Figure 5-1: Work with User Selections screen

Type a **2** beside the Work with MP Workbench attribute and press Enter.

The system displays the Work with MP Workbench attribute in the Infinium CA *Work with User Selections* option only if you type **S2K** in the *Advanced Planning* field in the System Information attribute in *Work with Entity Controls* option within Infinium CA. The entry **S2K** in this field indicates that you have Infinium MP installed.

User Profile Defaults for		
Display Format Planning level		1 (1=Message ID, 2=Product, 3=Formula) 3 (1=MPS, 2=MRP, 3=Both)
Tailor selections by Planner Code Buyer Code Product Family/Class . Commodity Code		+
F2=Function keys F3=Exit	F4=Prompt	F7=Clear Defaults F24=More keys

Figure 5-2: Work with User Selections Workbench Defaults screen

Defining Infinium MP Workbench Defaults

Complete the fields on this screen to further customize the default view in the Demand Fulfillment Workbench that the system displays for your user profile.

Required entries include the *Display Format* and *Planning level* fields. Type an entry in the *Display Format* field to select whether the workbench displays exception situations by message ID, product, or formula. Type an entry in the *Planning level* field to determine whether the workbench displays only MPS messages, only MRP messages, or both.

To further customize your display, complete the fields under the Tailor selections by heading.

Press F7 to clear the default information.

Setting Infinium MP Demand Fulfillment Controls

At the Infinium MP Entity, Company, and Warehouse levels, you must set controls that specify:

- Whether you can delete firm planned batches, scheduled batches, or both
- Whether deletion of requisitions is allowed

Use the menu path below.

- Infinium MP
- Control Files
 - Work with Entity [WWE]

	Base Aj	oplication Information		
	fety Stock echnique	<u>1</u> (1=Lot for lot 2=Fixed Order	t	
Batch Numb Default Ba	Lot Size API er tch Status	<u>MP</u> <u>1</u> (0=Firm Planne 2=Work in Pro	,	I
Days Unit	sage User Exit of Measure Allow Batch Deletion	<u>DA</u> +	=Both, 2=Firm F	lanned
Planning H Present V	tion of Requisitions orizons Cutoff Period utoff Period	7_		
		rompt F10=QuikAccess	F24=More keys	

Figure 5-3: Work with Entity Base Application Information screen

Defining Batch and Requisition Deletion Controls

The system displays this screen when you type **2** to select the Base Application information attribute from the Work with Entity selection screen and press Enter.

Set these controls from the Base Application Information Attributes screens at the Infinium MP Entity, Company, and Warehouse Control levels. The system uses the Control file hierarchy to determine the controls to follow. See the "Maintaining Control Files" part in this guide for more information about the Control File hierarchy.

The following fields directly affect the Demand Fulfillment Workbench.

Status to Allow Batch Deletion

Your entry in this field controls whether or not users can delete manufacturing batches from within the Demand Fulfillment Workbench.

The system does not allow you to delete Work in Process batches, regardless of your entry in this field.

Allow Deletion of Requisitions

If you type \mathbf{Y} in this field, users can delete requisitions from within the Demand Fulfillment Workbench.

If you type **Y** in this field, the system further checks the security established for a user in the Infinium PM system. Only users who are authorized in Infinium PM to delete requisitions, can delete requisitions from within the Demand Fulfillment Workbench. The system does not perform this check until the Demand Fulfillment Workbench calls the Infinium PM programs.

Displaying Information in the Demand Fulfillment Workbench

The Demand Fulfillment Workbench allows you to tailor the way in which the system displays information. The three display modes for the Workbench are:

- By Message ID
- By Product
- By Formula

Define the default display for your user profile in the Infinium CA option *Work with User Selections*. See the "Setting Infinium CA Demand Fulfillment Controls" topic for more information about setting this control. The screens that follow provide an example of each display default.

Message ID Display

The screen below shows the way in which the screen displays information if your user profile is set to display by Message ID as the default.

Plar	ιD			. :		CRIPTION 107 Type		
Sele		or more of the f			oress Enter.			
		Message Descrip	tion			Suggested		UM
Sel		Type		Product De	scription	Commodi		
-		Review / Cancel		PROD21			0000	EA
-		Open Order	т.	PROD02			0000	EA
-		Inadequate Lead					0000	EA
_		Past Due Receip	ts	PROD02			0000	EA
_		Reschedule In		FORM06		0001	0000	LB
_		Open Order		FORM06		0001	0000	LB
_		Open Order		RAW11			0000	LB
_		Open Order		RAW13			9432	LB
_		Open Order		RAW19			7850	HR
_	MPS0005	Inadequate Lead	Time	FORM06		300.	0000	LB
							Mc	re
			F7 0		·			
-2=	unction	keys F3=Exit	F7=Se	lect'n Crite	eria F24=Mor	re keys		

Figure 5-4: Demand Fulfillment Workbench Message ID selection screen

Product Display

The screen below shows the way in which the screen displays information if your user profile is set to display by Product as the default.

Warehouse Plan ID		: ISW1 :	107 Plan des	CRIPTION 107	7
Select one Sel Produc: FORM06 PROD02 PROD021 RAW11 RAW13 RAW19		e following. Then Description INTERMED-FORMO APPLE PIE APPLE PIE, GRA ABSORBENT PELL RED DYE LABOR	16 INNY SMITH	25	ted Qty UM 30.0000 57.0000 75.0000 27.8320 21.8864 28.7850
F0-F	го_г ·	t F7=Select'n Crit	· F 04- N		Bottom

Figure 5-5: Demand Fulfillment Workbench Product selection screen

Formula Display

The screen below shows the way in which the screen displays information if your user profile is set to display by Formula as the default.

Warehouse . Plan ID		:	IS1 ISW1 107	Plan descr	EPTION 107	,
Select one (or more of th	e following.	Then pres	s Enter.		
Sel Formula		Descrip	tion		Suggest	ed Qty 3.5034
_ FORM03		REGULAR	Formula 3	- APPLE PIE		5.0000 7.0000
						Bottom
F2=Function	keys F3=Exi	t F7=Select	'n Criteria	F24=More I	keys	

Figure 5-6: Demand Fulfillment Workbench Formula selection screen

Using the Demand Fulfillment Workbench

When you select the *Demand Fulfillment Workbench* option, the system displays only plans to which you are authorized for the company and warehouse location.

The company and warehouse default from the Infinium CA *Control Files* option, within the *Work with User/Warehouse file* option.

Use the menu path below.

- Master Production Scheduling
 - Demand Fulfillment Workbench [DFW]

		Message ID .		CRIPTION 107 Type	
			wing. Then press Enter.		
		Message Description			UM
Sel		Type	Product Description	Commodity Fa	
_	MPS0003	Review / Cancel	PROD21	75.0000	EA
_	MPS0004	Open Order	PRODØ2	190.0000	EA
_	MPS0005	Inadequate Lead Tim	e PRODØ2	55.0000	EA
_	MPS0006	Past Due Receipts	PRODØ2	12.0000	EA
_	MPS0001	Reschedule In	FORMØ6	300.0000	LB
_	MPS0004	Open Order	FORMØ6	300.0000	LB
_	MPS0004	Open Order	RAW11	40.0000	LB
	MPS0004	Open Order	RAW13	10.9432	LB
		Open Order	RAW19	28.7850	HR
_		Inadequate Lead Tim	e FORMØ6	300,0000	LB
-				Mor	ъ
		L F0_F 'I F7_0	elect'n Criteria F24=Mor		

Figure 5-7: Demand Fulfillment Workbench selection screen

The sequence on the screen above and in the section that follows is by Message ID.

Press F11 to view additional information on this screen.

If your display sequence is by formula, the quantity that the system displays reflects the total of all products from this run created by the formula.

To select a message on which to take action (or formula or product depending on the screen sequencing), type a 1 beside it and press Enter. You can make more than one

selection at a time. If you select a plan that was not generated in detail, the system displays a message informing you of this. Use only plans generated in detail in the Demand Fulfillment Workbench. To remedy this, work with another plan or regenerate your original plan in detail.

For action messages MPS0004 (Open Order), MPS0005 (Inadequate Lead Time) and MPS0007 (Exceeded Maximum Reorder Quantity), the system lists the individual products when you take an action to create a batch or a requisition. For all other action messages, the individual batches and/or requisitions display on the Demand Fulfillment Workbench screen.

If no plans are authorized for you at this company and warehouse location, the system displays a message informing you of this. Press F8 to select an authorized plan from another company and warehouse (if you are authorized to do so) or exit this option and authorize the plan in question.

The plan that the system retrieves is the authorized plan for your default company and warehouse. If none of your plans are authorized, the system sends you a message. Then you must select an existing authorized plan or exit this option and authorize a plan.

Before you select the exception on which you are taking action, press F8 to include other criteria within your display.

9:41:06 MPGWBM 12/30/97 Demand Fulfillment Workbench MPDWBM Additional Selections TS1 + Company . . <u>IS₩1</u> Warehouse . Plan Identifier . 107 Planner ÷ Buyer . . . Commodity Code . Product Family . . Formula . . Beginning Product . Message ID F2=Function keys F3=Exit F4=Prompt F10=QuikAccess F24=More keys

Changing Selection Criteria

Figure 5-8: Additional Selections screen

When you press F8, the system displays the Additional Selections screen where you can add to or change the plan selection criteria. Adding to or changing your selections causes the system to rebuild and redisplay the Demand Fulfillment Workbench list of information.

The system uses your user default company and warehouse on the initial selection screen. You can override these if your user profile allows for multiple companies and warehouses.

		Selecti	ion Criteria		
Company Warehouse Plan Identifier . Display Format . Planning Level . Planner Buyer Sommodity Code . Product Family . Formula Beginning Product Message ID			IS1 ISW1 000000107 1 (1=Message ID, 3 (1=MPS, 2=MRP,		3=Formula)
F2=Function keys	F3=Exit F	-10=QuikAd	ccess F12=Cancel	F18=Messag	e line

Viewing Display Default Settings



You can also view the default display settings that are defined for your user profile, by pressing F7 on the Demand Fulfillment Workbench selection screen.

To alter selection criteria, press $\boxed{F12}$ to cancel out of this screen and return to the Demand Fulfillment Workbench screen. From there, press $\boxed{F8}$ to go to the Additional Selections screen.

Using Action Codes

After you set your display selections, type **1** next to the message (or formula or product depending on the screen sequencing) on which you are taking action. Then press Enter to display the Demand Fulfillment Workbench screen where you define the actions that you will take.

Company : Warehouse : Product : Unit of Measure . : Plan ID : Action Message ID :			PTION 107	PIE,	GRANNY SMIT	Ή
Act * Reference ID 00IS1-00039-PO		antity	Original Due 12/11/1997	New Due	New Start	:
						Bottom
F2=Function keys F3=	Exit F4=Promp	t F10=6)uikAccess	F24=I	lore keys	

Figure 5-10: Demand Fulfillment Workbench screen

Type an Action code in the Act field to work with the applicable item.

Each message ID corresponds to an exception condition that requires some further action or decision. For example, the Message ID MPS006 indicates that there is a past due receipt for a product in Infinium PM or a manufacturing batch in Infinium MC.

From the Demand Fulfillment Workbench selection screen, type the appropriate Action code next to a message ID, product, or formula to take further action.

Specific action messages correspond to certain message IDs. For example, the Action code CD, represents the action Change Date. You can apply this action only to message IDs MPS0001 (Reschedule in), MPS0002 (Reschedule out), or MPS0006 (Past due receipts).

For manufacturing batches, the system limits Action codes CD (Change Date), DL (Delete Receipt), and MR (Maintain Receipt) to batches with the status of firm planned or scheduled production.

The tables that follow illustrate message ID descriptions, available Action codes, their descriptions, the message IDs to which they are applicable, and the result of the actions that you can take.

The table below lists action message IDs that display in the Demand Fulfillment Workbench and their descriptions.

Action Message ID	Action Message Description
MPS0001	Reschedule In
MPS0002	Reschedule Out
MPS0003	Review/Cancel
MPS0004	Open Order
MPS0005	Inadequate Lead Time
MPS0006	Past Due Receipts
MPS0007	Exceeded Maximum Reorder Quantity

The table below lists Action codes, their descriptions, the message ID to which they apply, and the result of using an Action code on them.

Action Code	Description	Applicable Message ID	Result
СВ	Create batch	MPS0004 (Open Order) MPS0005 (Inadequate	If you select this Action code, the system displays the Demand
		Lead Time)	Fulfillment Workbench Create Batch screen, and from here you
		MPS0007 (Exceeded Maximum Reorder Quantity)	can schedule a batch.
		Use only on products that have a formula assigned to them in the Product file.	
CBD	Create batch using defaults	MPS0004 (Open Order)	If you select this Action code, the
		MPS0005 (Inadequate Lead Time)	system automatically creates the batch for you using default information.
		MPS0007 (Exceeded Maximum Reorder Quantity)	
		Use only on products that have a formula assigned to them in the Product file.	

Action Code	Description	Applicable Message ID	Result
CR	Create	MPS0004 (Open Order)	If you select this Action code, the
	requisition	MPS0005 (Inadequate Lead Time)	system displays the Demand Fulfillment Workbench Create Requisition screen, and from here
		MPS0007 (Exceeded Maximum Reorder Quantity)	you can create a requisition.
		You can create requisitions for purchased or manufactured products.	
CRD	Create	MPS0004 (Open Order)	If you select this Action code, the
	requisition using defaults	MPS0005 (Inadequate Lead Time)	system automatically creates the requisition for you using default information.
		MPS0007 (Exceeded Maximum Reorder Quantity)	
		You can create requisitions for purchased or manufactured products.	
CD	Change date	MPS0001 (Reschedule In)	If you select this Action code for a
		MPS0002 (Reschedule Out)	manufactured batch, the system displays the Work with Batch Dates screen. If you select this Action
		MPS0006 (Past Due Receipts)	code for a purchased product, the system displays the Purchase Requisition header screen.

Action Code	Description	Applicable Message ID	Result
DL	Delete receipt	MPS0003 (Review/Cancel)	If you select this Action code for a manufacturing batch, the system displays the Delete Batches Confirmation screen. If you select this Action code for a purchase requisition, the system displays the Purchase Requisition header screen.
			Within Infinium MC you can delete only firm planned or scheduled batches.
			Also, you can delete batches only if the <i>Status to allow batch deletion</i> field in the Infinium MP Control files is set to 1 for both, 2 for firm planned batches only, or 3 for scheduled batches only. If this flag is set to 2 or 3 , you can delete only those specific types of batches.
			Regarding purchase requisitions, the system checks the setting in the <i>Allow deletion of requisitions</i> field in the Infinium MP Control files and in your Infinium PM user profile setup to ensure that you are authorized to delete requisitions. The Demand Fulfillment Workbench performs the Infinium PM authority check once it calls the Infinium PM programs.
MR	Maintain receipt	MPS0001 (Reschedule In)	If you select this Action code for a
		MPS0002 (Reschedule Out)	manufacturing batch, the system displays the Work with Batch Dates screen where you can edit an
		MPS0003 (Review/Cancel)	existing firm planned or scheduled
		MPS0006 (Past Due Receipts)	batch. If you select this Action code for purchase requisitions, the system displays the Purchase Requisition header screen where you can edit requisition information.

Action Code	Description	Applicable Message ID	Result
DR	Display receipt	 MPS0001 (Reschedule In) MPS0002 (Reschedule Out) MPS0003 (Review/Cancel) MPS0006 (Past Due Receipts) 	If you select this Action code for an existing manufacturing batch, the system displays the Display Batch selection screen. If you select this Action code for an existing purchase requisition, the system displays the Requisition Inquiry header screen.
PR	Display product requirements	You can enter this Action code on any message.	If you select this Action code, the system displays the Display Available to Promise screen.
RL	Display resource load	You can enter this Action code on any message.	If you select this Action code, the system displays the Resource Load Summarization screen. The system assumes defaults for various fields.
DM	Display MPS/ MRP	You can enter this Action code on any message.	If you select this Action code, the system displays the Display Master Production Schedule screen or the Display Material Requirements screen. The screen you go to depends on the message type.
RC	Rough Cut Capacity Planning report	You can enter this Action code on any message.	If you select this Action code, the system displays the Rough Cut Capacity Report screen. The system assumes defaults for various fields.

When you select the Action codes CB, CR, CD, DL, CBD, CRD, or MR, the system writes an audit record to the Action Message Audit file which tracks all action message activity. You can purge action message history using the *Purge Action Message Audit File* option. See the "Purging Action Messages from the Audit File" topic.

Using the Action Codes CBD and CB

Using CBD

The Action code CBD (Create Batch Defaults) allows you to have the system automatically create the batch for you using default information. If you use CBD, the system automatically creates the batch with the necessary fields defaulted in, and returns you to the main menu.

Using CB

If you use the CB (Create Batch) Action code, the system displays the Demand Fulfillment Workbench Create Batch screen where you can schedule a batch for Open Orders, Inadequate Lead Times, and Exceeded Maximum Reorder Quantities.

You can use the CBD and CB Action codes only on products with a formula assigned to them in the Product file.

		:		;				
Inventory Suggested				80 0000	Standard B	atch Siza		100.0000
Scheduled (Quantit	y						
Date			121519	197				
Fill Produ	ct		Fill	Quantit	y			
PROD02				80.000	0			
								D
								Bottom
		E3=Evit	E6=Cr	eate F1	0=QuikAccess	F24=More	keys	
F2=Function	n keys		10.01	00.00				

Figure 5-11: Demand Fulfillment Workbench Create Batch screen

The system displays this screen when you type **CB** in the *Act* field for an applicable message ID, product, or formula. From this screen, you can change the scheduled quantity and create the batch. To create a batch, press $\boxed{F6}$.

If lot control is enabled and you create a batch through this function, the system creates the lot number when the batch is created. If your controls are set up to assign the lot number based on the manufacturing batch number, the manufacturing batch number is used as the lot identifier. If your controls are set up to automatically generate a lot number, the system assigns the next available lot number for the lot identifier.

Using the Action Codes CRD and CR

Using CRD

The Action code CRD (Create Requisitions Using Defaults) allows you to have the system automatically create the requisition for you using default information. If you use CRD, the system automatically creates the requisition with the necessary fields defaulted in and returns you to the main menu.

The requisition type APS must exist in Infinium PM prior to automatically creating requisitions from Infinium MP.

Using CR

If you use the CR (Create Requisition) Action code, the system takes you to the Demand Fulfillment Workbench Create Requisition screen where you can create a purchase requisition.

Inventory Unit Suggested Quant Buyer	tity	:	EA 110	0000		
Product PRODØ2	Size	Qı	uantity 10.0000	Vendor +	Required Date 12221997	-
						Bottor

Figure 5-12: Demand Fulfillment Workbench Create Requisition screen

The system displays this screen when you type **CR** in the *Act* field for an applicable message ID, product, or formula.

On this screen, you can enter a vendor or change the date. To create a requisition, press $\boxed{F6}$.

Using the CD Action Code on Infinium PM Requisitions

If you select the Action code CD (Change Date) for a purchase requisition, the system displays the Infinium PM Purchase Requisition header screen.

	Header		
Company : Requisition ID : Status	01 OPEN		
Type : Line Type : Need Date :	Ρ		
Description	This should be past due		-
Requester ID Total Cost/Curr :	BFR + Rhonda.Richardson USD		
Total Lines :	-		
Project ID Department ID			
Phrase Codes		+	
Action Messages : Notes	••	Insp Ø Inv Ø	
•	t F5=User Fields F8=Approval Notes 12=Cancel F15=Action Messages F24=		QuikAccess
5	5	5	_

Figure 5-13: Purchase Requisition header screen

From this screen you can change the date of the requisition.

The system may not allow you to change requisition information if your Infinium PM user controls do not authorize you to do so.

Using the DL Action Code on Infinium PM Requisitions

If you select the Action code DL (Delete Receipt) for a purchase requisition, the system displays the Infinium PM Purchase Requisition header screen.

		Header		
Requisition Status Type Line Type Need Date	ID : IS 01 RE P P IH D Bi Curr : ID s ages : Ag	EG REGULAR.PURCHASE.REQUISITION 	+	_
		5=User Fields F8=Approval Notes F Cancel F15=Action Messages F24=Mor		=QuikAccess

Figure 5-14: Purchase Requisition header screen

From this screen you can delete the requisition. To do so, press F22.

Depending on your Infinium PM user controls, you may not be authorized to delete a requisition.

Using the MR Action Code on Infinium PM Requisitions

If you select the Action code MR (Maintain Receipt) for a purchase requisition, the system displays the Infinium PM Purchase Requisition header screen.

		Header		
		ES1 INFINIUM.SOFTWARE.(INSTRUCTOR)		
Status		I-RFR-00024-R OPEN		
		G REGULAR.PURCHASE.REQUISITION.		
Type Line Type				
Need Date				
		is should be past due		
		3 shourd be past due 3 shourd due 3 shourd due 3 shourd due 3 shourd due 3 shourd due 3 sh		
Total Cost/Curi		USD		
Total Lines .	• •			
Project ID .		-		
Department ID				
Phrase Codes			+	
Action Message	s:Ap	or Q Quote Q Pur Q Rov Q In:	sp0 Inv0	
Notes				
F3=Exit F4=Pro	ompt F	5=User Fields F8=Approval Notes F	9=Notes F10=	QuikAccess
F11=Fast Entry	F12=C	ancel F15=Action Messages F24=Mor	e keys	
5		_	-	

Figure 5-15: Purchase Requisition header screen

From this screen you can change the requisition header information or press $\boxed{\mathsf{Enter}}$ to access the Detail selection screen.

Depending on your Infinium PM user controls, you may not be authorized to change a requisition.

Using the CD Action Code on Infinium MC Batches

If you select this action for a manufacturing batch, the system displays the Work with Batch Dates screen.

Company	. : ISW1 . : OP0804970002	A 3
Calculated Yield Established Wt/Vol and Yield . Batch Yield Archive Reference Scheduled Date Planned Usage Date Planned Production Date	. : UM: . : 12.0000 Batch UM: . : . <u>8071997</u> . <u>8071997</u> . <u>8071997</u>	EA
Ship Date		
F2=Function keys F3=Exit F4=F	rompt F10=QuikAccess F24=More keys	

Figure 5-16: Work with Batch Dates screen

Use this screen to alter any date information for the batch.

Using the DL Action Code on Infinium MC Batches

If you select the DL action for a manufacturing batch, the system displays the Delete Batches Confirmation screen.

1/07/98	13:49:23	Delete Batch	es		MCGDBM	MCDDBM
Press Cance Sts Batch				UM GL	Comp k BLS B	
						Bottom
F2=Functio	n keys F10=Quiki	Access F12=Cancel	F18=Me	essage	line	

Figure 5-17: Delete Batches Confirmation screen

Press Enter to submit the job for deletion.

Using the MR Action Code on Infinium MC Batches

If you select the MR (Maintain Receipt) action for an existing manufacturing batch, the system displays the Work with Batch screen.

	d Warehouse		IS1 ISW1 OP 080497 0002		
			FORM03	REGULAR	Formula 3 -
Standard B Establishe Archive Re	Yield atch Size d Wt/Vol and Yiel ference	 Id	100.0000		um ea Ea
Loss Facto Yield Mult No. of Gri No. of Tic Planned Us Planned Pr Scheduled	d	 Id 	<u>12.0000</u> <u>.0000</u> <u>1.00</u> <u>.</u> <u>.</u> <u>.</u> <u>.</u> <u>.</u> <u>.</u> <u>.</u> <u>.</u> <u>.</u> <u>.</u>		UM E <u>A</u> +
· F?-F+:.	n koue E3=Evit	F4=Promot	F6=Create F24=Mor	e keus	

Figure 5-18: Schedule Batches screen

Use this screen to change dates, quantities, and other information for the manufactured batch.

Using the DR Action Code on Infinium PM Requisitions

If you select the DR (Display Scheduled Receipt) action for an existing purchase requisition, the system displays the Requisition Inquiry header screen.

Company :	IS1 INFINIUM SOFTWARE (INSTRUCTOR)		
Requisition ID :	IS1-RFR-00024-R		
Status	01 OPEN		
Туре :	REG REGULAR PURCHASE REQUISITION		
Line Type :	Р		
Need Date :	1/05/1998		
Description :	This should be past due		
Requester ID . :	RFR Rhonda Richardson		
Total Cost/Curr :	.00 USD		
Total Lines :	1		
Project ID :			
Department ID . :			
Phrase Codes			
Action Messages : Notes :	Appr 0 Quote 0 Pur 0 Rcv 0 0	Insp 0	Inv 0
	elds F6=Created By F7=Approval Audit	F24=More	keus

Figure 5-19: Requisitions Inquiry header screen

Use this screen to display various purchase requisition information.

Using the DR Action Code on Infinium MC Batches

If you select this action for an existing manufactured batch, the system displays the Display Batch selection screen.

~			Batch Seque			
Company .						
Warehouse						
Position T			· · ·			
Type optio				Б . I		<u> </u>
	2=Ingr	edients	3=Finished	Products Production		rs 6=Usr Fld al/Scheduled-
S St Bat	ch	Formula		Date	Yield	UM
	497 0002	FORM03		08/07/1997		12.0000 EA
						Botta
	n koun E3	=Exit E10)=QuikAccess	F24=More ke	us	

Figure 5-20: Display Batch selection screen

Use this screen to display various batch information.

Using the PR Action Code

Use the PR Action code on any action message to display the Display Available to Promise screen.

Company IS1 Description APPL 1=Select	Warehouse ISW1 E PIE	Product PROD02 Onhand Other Inventory	Size 134.0000- EA .0000 EA
Opt Date _ 99/99/9999	Supply UM .0000 EA	Demand UM 95.0000 EA	
			Bottom
F2=Function keys	F3=Exit F10=Quik	Access F12=Cancel	F24=More keys

Figure 5-21: Display Available to Promise screen

Use this display to determine at what point you can promise delivery of products to your production facility. The system determines requirement quantities using the following equation:

On Hand + Other Inventory + Supply - Demand

Using the RL Action Code

Use the RL Action code on any action message to display the Resource Load Summarization screen.

12/30/97 1	2:01:21	Resource I	Load Summari	zation	MPGRLB	MPDRLB
Company Warehouse Batch Status Resource Sele Resource Write to work Run options . Summarize Opt Date Range .	ection 	· · · · · · · · · · · · · · · · · · ·	2=Wor _ + + RAW13 N (Y=Yes 2 (1=Pri	k in Proce _ + _		ł

Figure 5-22: Resource Load Summarization screen

This option provides information about selected resources from either scheduled or in process batches in Infinium MC. The system defaults information in the fields on this screen as shown in the table below.

Field	Value
Batch status	3
Resource Selection	blank
Write to work file	N
Run options	2
Summarization Options	1

Field	Value
Beginning date	00/00/0000
Ending date	00/00/0000

Using the DM Action Code

Use the DM Action code on any action message to display either the Master Production Schedule screen or the Material Requirements Plan screen. The screen that the system displays depends on the message type. From either screen you can display various information.

Plan ID 111	Product	t RAW13	3			
			Past	Due	12/01/1997	12/02/1997 2
Independent Demand Dependent Demand Receipts			11.	9432	·	L
Projected Availabl Projected Onhand Planned Order Rece			10.	9432-	10.9432- 10.9432	10.9432 [.]
Planned Order Rele	ase		10.	9432		More
F2=Function keys	F3=Exit I	-10=Qui	kAccess	F7=Head	ler F12=Cancel	

Figure 5-23: Display Material Requirements screen

The system displays this screen when you select the DM (Display MPS/MRP) Action code.

The system displays the appropriate option based on whether the Message ID is for an MRP or MPS.

Using the RC Action Code

Use the RC Action code on any message to display the Rough Cut Capacity Report screen. The system assumes several field defaults, which you can override.

Company IS1 + Warehouse ISW1_ + Plan ID II11_ + Using Formula IY (Y=Yes, N=No) Type of Resource + + + + + + + + Critical Resources Only N (Y=Yes, N=No) Number of Periods (X usage to print as exception) Alert Percentage of Usage (X usage to print as exception) Alert Output to Workfile (Y=Yes, N=No)	12/30/97 12:04:10	Rough Cut	Capacity Report	MPGRCB	MPDRCB
Using RCCP Formula	Warehouse		<u>ISW1</u> +		
	Using RCCP Formula Type of Resource Critical Resources Only . Number of Periods Alert Percentage of Usage Alert Percent of Cumulativ	 	N (Y=Yes, N=No) * * * * N (Y=Yes, N=No) _12_ * (% usage to (% usage to		•

Figure 5-24: Rough Cut Capacity Report screen

When the system displays the Rough Cut Capacity screen, the screen contains the company, warehouse, plan ID, and number of periods in the plan that you are using. Additional information defaults as shown in the table below.

Field	Value
Using Formula	Y
Using RCCP Formula	N
Type of Resource	blank
Critical Resources Only	N
Write Output to Workfile	N

Once you complete the screen, press F8 to generate the Rough Cut Capacity report.

Purging Action Messages from the Audit File

When you use the Action codes CB, CR, CD, DL, CBD, CRD, or MR, the system writes an audit record to the Action Message Audit file, which tracks all action message activity. Periodically purge this file to conserve system resources.

Use the menu path below.

- Utilities
 - Purge Action Message Audit File [PAMAF]

Select	one or m	ore of the	e followin	g. Then	press Enter.		
Opt PI 1 -	an ID 107 111		on RIPTION 1 RIPTION 1			Run Time 7 10:17:23 7 10:30:45	
		<u>го-г</u> и			F18=Message li		Bottom

Figure 5-25: Purge Action Message Audit File screen

Type 1 beside the plan or plans you are selecting for the purge and press Enter.

Confirming the Purge

		o confirm your o cancel your				
rress une	vancer key t	u cancer your i	choice for	· uerete.		
Pla	n ID Descri 107 PLAN D	ption ESCRIPTION 107		Run Date 12/26/1997	Run Time 10:17:23	
						Bottor
F2-Funati	on kous E3=E	vit F10=0uilA	eeee F1	2=Cancel F24=Mo	na kouc	

Figure 5-26: Purge Action Message Audit File Confirmation screen

Press F22 to confirm the purge or press F12 to cancel the purge.

Part 6 Infinium MP Displays

6

The part consists of the following topics:	
Торіс	Page
Working with Available To Promise	6-2
Displaying Product Requirements	6-10
Working with Resource Load Summarization	6-16
Displaying Action Messages	6-21

Working with Available To Promise

The system provides you with options to view the availability of raw materials and products and how supply and demand created by customer, production, and purchase orders affects them.

Use the *Display Available To Promise* option to determine at what point you can promise delivery of products to your customer. The system calculates available to promise (ATP) quantities using the following equation:

On Hand + Other Inventory + Supply – Demand

Establish inventory types that make up each component for the available to promise equation in the Inventory Type file in the *Control Files* option in Infinium IC by the entries you make in the ATP column.

The *Display Available To Promise* function takes into account supply and demand created by orders entered through Infinium OP, Infinium PM, and Infinium MC.

Use the menu path below.

- Advanced Planning Report/Display
 - Display Available To Promise [DATP]

1/02/98	8:44:07	Display Avai	lable To Promise	PRGATPD	PRDATPD
Warehouse Product . Size Number of [IS1 * ISW1_ * PROD01 120		
F2=Function	n keys F3=E:	kit F4=Prompt	F10=QuikAccess	F24=More keys	
					I

Figure 6-1: Display Available To Promise selection screen

The value in the *Number of Days* field determines how many days out from today's date the system calculates available to promise. You can override this value.

Company IS	1 Warehouse CHERRY PIE	ISW1	Product PRO Onha		Si: 415568.0000	ze EA
Description 1=Select	UNERRI PIE		Other Invento			EA
Opt Date	Supply	UM	Demand	UM	ATP	UM
08/07/1997	11 0	EA	88.0000	EA	415490.0000	EA
1 12/15/1997		EA	.0000	EA	415590.0000	EA
_ 12/16/1997	.0000	EA	12.0000	EA	415578.0000	EA
12/19/1997		EA	10.0000	EA	415568.0000	EA
_ 12/22/1997	.0000	EA	12.0000	EA	415556.0000	EA
_ 99/99/9999	.0000	EA	115.0000	EA	415441.0000	EA
					I	Botto
F2=Function k	eys F3=Exit F10	⊨QuikA	ccess F12=Cance	I F2	:4=More keys	

Figure 6-2: Display Available To Promise screen

From this screen press $\boxed{F21}$ to override the defaults which determine whether certain inventory types fall under the on hand, supply or demand categories. This override is only for this execution of the display.

ATP Overrides

1/02/98	9:12:46	Display	Available	To Promise	PRGATPD	PRDATPD
)escription	1		ATP			
	PRODUCTION		1			
JORK IN PRO	CESS (BATCH	USAGE)	2			
COMMITTED S	ALE (ORDER)		2			
SCHEDULED (Isage (Batch	USAGE)	2			
JORK IN PRO	ICESS (PRODU	ICTION)	1			
on order fr	IOM VENDORS	'PURCHASE	1			
FUTURE SALE	s (master (RDERS)	2			
COMMITTED 3	SSUE/TRANSF	ER	2			
on order fr	IOM WAREHOUS	Ε	1			
FIRM PLAN (RDER (BATCH	USAGE)	2			
FIRM PLAN (RDER (PRODU	JCTION)	1			
PURCHASE RE	QUISITION		_			
	. I			E12-0I	E10-M	1:
Z-FUNCTION	гкеуз го-с	אוד דוט–ע.	UTKICCESS	112-Jancel	F18=Message	ine

Figure 6-3: Display Available To Promise Override screen

Complete the *ATP* fields as follows:

- Leave the field blank to exclude any inventory type
- Type **1** to include inventory types in the supply total
- Type **2** to include inventory types in the demand total
- Type **3** to include inventory types in the other inventory total

Press Enter to return to the Display Available To Promise screen 1.

Company IS1 Description CHER		ISW1	Product PRO Onha Other Invento	nd		ze EA EA
1=Select Opt Date 1 08/07/1997 _ 12/15/1997 _ 12/16/1997 _ 12/19/1997 _ 12/22/1997 _ 99/99/9999	Supp I y 10.0000 100.0000 .0000 .0000 .0000 .0000	um Ea Ea Ea Ea Ea	Demand 88.0000 .0000 12.0000 10.0000 12.0000 115.0000	um Ea Ea Ea Ea	ATP 415490.0000 415590.0000 415578.0000 415568.0000 415556.0000 415441.0000	um Ea Ea Ea Ea Ea
					ł	Bottom
 F18=Message line	F21=0verride	e Defau	lt F24=More key	s		

Figure 6-4: Display Available To Promise screen 1

When you return to the Display Available To Promise screen 1 shown above, the quantities reflect any changes made. The changes you make are for this display only and do not affect the permanent settings.

Sometimes you have data with a date of 99/99/99. The quantity in the Demand column for the date 99/99/99 reflects the total of all open customer orders where the *Requested Delivery Date* or *Scheduled Ship Date* field is blank, or production orders where the *Scheduled Production Date* field is blank.

The quantity in the Supply column for the date 99/99/99 reflects the total of all open production orders for the designated item where the *Scheduled Production Date* field is blank.

Type **1** in the *Opt* field next to any line to drill down to additional information detailing the production, purchase, or sales orders that make up the supply or demand quantities.

Company Descriptio	IS1 n CHERF	Warehou XY PIE	se ISW1		t PRODØ Onhand nventory	415568.00	Size 000 EA 000 EA
_ WORK I	d invênt N proces	Tory S (Batch	Date 08/07/1 US 08/07/1 PUR 08/07/1	997 997	Quantit 10.000 17.000 71.000	0 415578 0 415561	.0000 EA
							Botto
F2=Functio	n keys	F3=Exit	F10=QuikAd	cess F12	=Cancel	F18=Message	line

Figure 6-5: Display Available To Promise screen 2

This display includes the inventory types for all dates down to and including the date selected on the previous screen.

Type **1** in the *Opt* field to drill down to the next level of detail showing the specific orders making up the quantities for each inventory type.

ATP Drill Down

Company	IS1 War	ehouse IS	¢1 Prod	uct PROD01	S	ize
Description	n CHERRY PI	E		Onhand	415568.0000	EA
			Other	Inventory	.0000	EA
1=Select Opt Ref ID 1 0P0804970	0001		Desc (PRODUCTION	Date) 08/07/1997	Quantity 10.0000	um Ea
						Bottom
		0.110	E10.0	F18=Messag	1.	
					n lino	

Figure 6-6: Display Available To Promise screen 3

The value the system displays in the *Ref ID* column is the Infinium MC batch number, the Infinium OP order number or the Infinium PM purchase order number.

Type **1** in the *Opt* field next to the Ref ID for which you want to drill down to the next level displaying the order details. The system displays the open order display information from the system in which the order originated.

For this example, the following screens are from Infinium MC.

Batch Information

			Batch					
Company			:	IS	1			
Warehouse .				IS₩1				
Position To								
Type option			<u>о г</u>		Б І .	40	<i>с</i> 11	F 1.1
	Z=1ngr	redients	3=Fini	shed	Products	4=Containe		
о. р.		- I			Production		al/Schedu	
S St Batc		Formula			Date	Yield	10 0000	UM
	97 0001	FORM02			08/07/1997		10.0000	EA
_ 1 UP 0804	97 0002	FORM03			08/07/1997		12.0000	EA
							F	ottom
							-	
F2=Function	keus F3	B=Exit F10)=QuikAc	cess	F24=More ke	eus		
						-3-		-



Type **2** in the *S* field and press $\boxed{\text{Enter}}$ to display a list of the batch ingredients.

Ingredient Information

1/02/98	9:18:		betani	For Ingre	arento		MCR01	,	MC019FM
Batch				.: OP 6	80497	1			
				Schedu	led		Actu	al	
Material		Size		Qty	UM		Qty	UM	
RAW08				3.9746	LB		3.9746	LB	
RAW13				. 9937	LB		. 9937	LB	
raw01				3.9746	GL		3.9746	GL	
Form05				11.9233	LB		11.9233	LB	
									Bottom
F2=Function	keys	F3=Exit	F10=Q	uikAccess	F24=More	keys			

Figure 6-8: Display Batch screen 2

This screen displays the ingredients in the quantities applied to this order.

Displaying Product Requirements

Use this option to determine at what point you can promise delivery of products to your production facility. The system determines product requirement quantities using the following equation:

On Hand + Other Inventory + Supply – Demand

This option is identical to the *Display Available To Promise* option previously described, except that you establish the inventory types that make up each component for the product requirement equation in the Inventory Type file in the *Control Files* option in Infinium IC by your entries in the MPS column.

The *Display Product Requirements* option takes in to account supply and demand created by orders entered through Infinium OP, Infinium PM, and Infinium MC.

Use the menu path below.

- Advanced Planning Report/Display
 - Display Product Requirements [DPR]

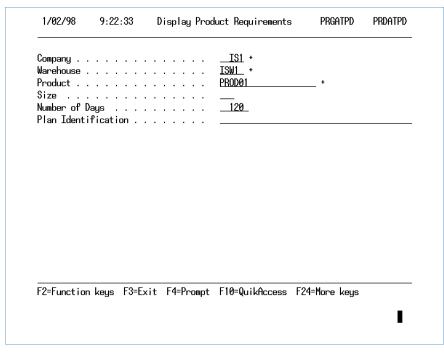


Figure 6-9: Display Product Requirements selection screen

The value in the *Number of Days* field defaults from the Infinium CA entity, company, or warehouse control files and determines how many days out from today's date the system calculates product requirements.

Product Requirements

Company	IS1	Warehouse	ISW1	Product PRO	D01		Size
Descripti	on CHER	RY PIE		0nha	nd	415568.0000	EA
				Other Invento	ry	. 0000	EA
1=Selec Opt	t Date	Supply	UM	Demand	UM	A	TP UM
08/07/		10.0000	EA	88.0000	EA	415490.00	
12/15/		100.0000	EA	.0000	EA	415590.00	
12/16/		.0000	EA	12.0000	EA	415578.00	
1 12/19/		.0000	EA	10.0000	EA	415568.00	
12/22/	1997	.0000	EA	12.0000	EA	415556.00	00 EA
_ 99/99/	9999	. 0000	EA	115.0000	EA	415441.00	00 EA
							Bottom
F2=Functi	on keys	F3=Exit F10)=QuikAc	cess F12=Cance	I F2	4=More keys	

Figure 6-10: Display Product Requirements screen 1

From this screen press F21 to override the defaults which determine whether certain inventory types fall under the on hand, supply or demand categories. This override is only for this execution of the display.

MPS/MRP Overrides

1/02/98	9:23:4	5 Display	Product	Requirements	PRGATPD	PRDATPD
Description	ı		MPS/MRI	0		
SCHEDULED	(PRODUCTI)) (NC	1			
WORK IN PRO	DCESS (BAT	(CH USAGE)	2			
COMMITTED \$	SALE (ORDEI	3)	2			
SCHEDULED (JSAGE (BA	(CH USAGE)	2			
WORK IN PRO	DCESS (PRO	DUCTION)	1			
on order ff	rom vendoi	rs/purchase	1			
FUTURE SALE	es (mastei	r orders)	2			
COMMITTED]	ESSUE/TRAI	NSFER	2			
on order fr	Rom Wareho	DUSE	1			
FIRM PLAN ()rder (ba ⁻	(CH USAGE)	2			
FIRM PLAN ()rder (Pr	DUCTION)	1			
PURCHASE RE	QUISITIO	N	_			
E9-E+!	Lunua E		.:	E12-0	E10-M	1:
FZ-FUNCTION	i keys F	ס−ב×וד דווט=עַנ	IIKHCCES	s F12=Cancel	r i o-riessage	i ine

Figure 6-11: Display Product Requirements Override screen

Complete the *MPS/MRP* fields as follows:

- Leave the field blank to exclude any inventory type
- Type **1** to include inventory types in the supply total
- Type **2** to include inventory types in the demand total
- Type **3** to include inventory types in the other inventory total

Press Enter to return to the Display Product Requirements screen 1.

Company	ISI	Warehouse	IS₩1	Product PRO	D01	S	ize
Descripti	on CHERF	RY PIE		0nha	nd	415568.0000	EA
				Other Invento	ry	. 0000	EA
1=Selec	-						
	Date	Supply	UM	Demand	UM	AT	
_ 08/07/		10.0000	EA	88.0000	EA	415490.000	
1 12/15/		100.0000	EA	.0000	EA	415590.000	
_ 12/16/		. 0000	EA	12.0000	EA	415578.000	
_ 12/19/		. 0000	EA	10.0000	EA	415568.000	
_ 12/22/		. 0000	EA	12.0000	EA	415556.000	
_ 99/99/	9999	.0000	EA	115.0000	EA	415441.000	0 EA
							Bottom
F2=Functi	an kous	F3=F2:+ F10	-0:レク	ccess F12=Cance	I F2	4=Mono kouo	

Figure 6-12: Display Product Requirements screen 1

When you return to the Display Product Requirements screen 1 shown above, the quantities reflect the changes. The changes you make are for this display only and do not affect the permanent settings.

Sometimes you have data with a date of 99/99/99. The quantity in the Demand column for the date 99/99/99 reflects the total of all open customer orders where the *Requested Delivery Date* or *Scheduled Ship Date* field is blank or production orders where the *Scheduled Production Date* field is blank.

The quantity in the Supply column for the date 99/99/99 reflects the total of all open production orders for the designated item where the *Scheduled Production Date* field is blank.

Type **1** in the *Opt* field next to any line to drill down to additional information detailing the production, purchase or sales orders that make up the supply or demand quantities.

Comp Desc	any : ription	IS1 CHERR	Warehou Y PIE	JSe	ISW1	Product	PRODØ Onhand		S 8.0000	ize EA
1=	Select				I	Other Inv	ventory		.0000	EA
	Invento ON HAND				Date 08/07/199		Quantiti 10.000		vailabl 578.000	
-					08/07/199 08/07/199	-	17.000	0 415	561.000 490.000	
_					12/15/199		100.000		490.000 590.000	
										Botton
 F2=F	unction	koue	F3=Fvi+	F10	=ໃນເປັດດວກ		Cancal	F18=Messa	a lina	
12-1		кеуз		110	QUI KIICCE	55 112-0	Jancer	110-118558	ye rine	

Figure 6-13: Display Product Requirements screen 2

This display includes the inventory types for all dates down to and including the date selected on the previous screen.

Type **1** in the *Opt* field to drill down to the next level of detail showing the specific orders making up the quantities for each inventory type.

	ES1	Warehouse	IS₩	1 Produ	uct PROD01		S	ize
Description	CHERI	RY PIE			Onhand	415568.0		EA
1=Select				Other	Inventory		0000	EA
Opt Ref ID		Inv T	.pe	Desc	Date	Quantity		UM
1 000000001				SALE (ORDER)	08/07/1997	10	.0000	EA
_ 000000007		COMMIT	TED 🔅	SALE (ORDER)	08/07/1997	25	.0000	EA
_ 000000008		COMMIT	TED 🗄	SALE (ORDER)	08/07/1997	10	.0000	EA
								D
								Bottom
F2=Function	keys	F10=QuikAcc	355	F12=Cancel	F18=Message	e line		

Figure 6-14: Display Product Requirements screen 3

The value the system displays in the Ref ID column is the Infinium MC batch number, the Infinium OP order number, or the Infinium PM purchase order number.

Type 1 in the *Opt* field next to the Ref ID for which you want to drill down to the next level displaying the order details. The system displays the open order display option from the system in which the order originated.

Working with Resource Load Summarization

The *Resource Load Summarization* option provides, in either display or report format, information about selected resources from either scheduled or in process batches in Infinium MC.

Information provided includes:

- Planned usage date
- Resource
- Resource description
- Scheduled quantity
- Daily capacity
- Percent utilization

You also have the option of writing the information to a work file which you can transfer to a personal computer for further processing.

Use the menu path below.

- Advanced Planning Report/Display
 - Resource Load Summarization [RLS]

1/02/98	9:31:23	Kesource Li	oad Summarization MPGRLB MPDRLB
Company			IS1 +
Warehouse .			<u>ISW1</u> +
Batch Status			3 (0=Firm Planned, 1=Scheduled 2=Work in Process, 3=All)
Resource Sel	ection		B + L + B + _ + _ +
-			+ + +
	kfile		N (Y=Yes, N=No)
			2 (1=Print, 2=Display)
	tions		2 (1=Resource/Date, 2=Date)

Figure 6-15: Resource Load Summarization prompt screen

The system requires entries in the *Batch Status*, *Write to work file*, *Run options*, and *Summarize Options* fields.

Leave the *Resource Selection* and *Resource* fields blank to include all resources on the display or report.

You can display the information provided by this option or you can print the Resource Load Summarization report.

Type **2** in this field to display the information, beginning with the screen on the following page.

To print the report, type 1 in the *Run options* field and press F8. A sample report is in the "Infinium MP Reports" appendix.

	1=Select Planned	Resource	Size	Scheduled	UM		Percent
	Production Date			Quantity		Util	ization
_	07/22/1997	Raw01		10.0000	GL		
1	07/22/1997	Raw03		3.5000	LB		
_	07/22/1997	raw04		50.0000	LB		
_	07/22/1997	RAW05		2.7000	LB		
_	07/22/1997	Raw06		. 5000	LB		
_	07/22/1997	raw07		110.0000	LB		
_	07/22/1997	RAW19		1.0000	HR		12.5000
_	07/25/1997	raw08		4.0000	LB		
_	07/25/1997	RAW13		1.0000	LB		
_	07/25/1997	raw01		4.0000	GL		
_	07/25/1997	raw02		150.0000	LB		
_	07/25/1997	raw04		1.1000	LB		
							More
F2 [;]	=Function ke	eys F3=Exi	t F10=QuikAcces	s F24=More ke	ys		

Figure 6-16: Resource Load Summarization screen 1

The system calculates the *Percent Utilization* field value by dividing the Scheduled Quantity by the Daily Capacity. Specify the daily capacity for the resource in the General Information attribute of the *Work with Item Warehouse* option in Infinium IC.

Type any character in the *Opt* field and press Enter to drill down to the next level of detail for any resource listed.

Press F11 to display the resource description.

The *Daily Capacity* field replaces the *Scheduled Quantity* field on this screen when you press $\boxed{F20}$ (Window Right). Press $\boxed{F19}$ (Window Left) to return to the *Scheduled Quantity* field.

Resource Load Summarization Drill Down

1/02/98	9:39:07	Drill	Down		PRGDDD	PRDDDD
Company I	S1 Warehou	use ISW1	Produc	t RAW03		Size
Description	BUTTER			Onhand	10000.0000	LB
			Other I	nventory	. 0000	LB
1=Select						
Opt Ref ID		nv Type Desc			Quantity	UM
1 MCBATCH 00	01 WOF	RK IN PROCESS	(BATCH	07/22/1997	3.500	0 LB
						Bottom
F2=Function	keys F10=Quil	Access F12=0	ancel	F18=Message	e line	

Figure 6-17: Drill Down screen

Type 1 in the *Opt* field and press Enter to drill down to the next level of detail for any Ref ID listed. The system displays the open order display option from the system in which the order originated.

For this example, the following screens are from Infinium MC.

Batch Information

			Batch Sequ	ence			
Company			: I	\$1			
Warehouse			: ISW	1			
Position To .		Batch					
Type options,	press	Enter.					
	2=Ingr	edients	3=Finished	Products	4=Containers	6=Usr	Flds
	_			Production	Actual/S	chedu	led
SSt Batch		Formula		Date	Yield		UM
_ 2 MC BATCH	0001	FORM06		07/22/1997	250.	0000	LB
_ 0 MC BATCH	0002	FORM06		07/22/1997	250.	0000	LB
_ 0 MC BATCH	0003	FORM02		08/18/1997	50.	0000	LB
_ 2 MC BATCH	0004	FORM02		09/15/1997	50.	0000	LB
_ 1 MC BATCH	0005	FORM02		07/25/1997	50.	0000	LB
2 1 MC BATCH	0006	FORM03		09/15/1997	100.	0000	EA
_ 2 MC BATCH	0007	FORM11		07/25/1997	200.	0000	LB
_ 2 MC BATCH	0008	FORM11		08/13/1997	200.	0000	LB
_ 1 MC BATCH	0009	FORM11		09/08/1997	200.	0000	LB
_ 1 MC BATCH	0010	FORM01		12/12/1997	100.	0000	GL
						Mo	re
F2=Function k	eus F3	Exit F10)=QuikAccess	F24=More ke	eus		
					-9-		

Figure 6-18: Display Batch screen

Type **2** in the *S* field and press $\boxed{\text{Enter}}$ to display a list of the batch ingredients.

bacch		: NU D	atch e)		
		Schedu	led	Actua	al	
Material	Size	Qty	UM	Qty	UM	
FORM11		50.0000	LB	50.0000	LB	
Form06		100.0000	LB	100.0000	LB	
RAW19		2.0000	HR	2.0000	HR	
						Bottor
		F10=QuikAccess				

Figure 6-19: Detail for Ingredients screen

Displaying Action Messages

Use this option to display action messages created when you generate the MPS and MRP. These messages prompt you to create new purchase or manufacturing orders. You can also use this option to plan changes to existing orders to bring the receipts into phase with the requirements.

Use the menu path below.

- Advanced Planning Report/Display
 - Display Action Messages [DAM]

1/02/98	10:01:34	Display f	Action Messages	Mpgamd	mpdamd
Plan ID .			107 +		
View by .			2 (1=Product,	2=Action Messag	je)
Action Mes	sage Type		<u>3</u> (1=MPS, 2=MR	P, 3=Both)	
F2=Functio	n keys F3=Exit	t F4=Prompt	F10=QuikAccess	F18=Message li	ne

Figure 6-20: Display Action Messages prompt screen

Complete all of the fields on this screen and press Enter to display action messages. Use the *View by* field to sort your display. You also can utilize the *Action Message Type* field to only view action messages generated by MPS or MRP.

	option, pr Select	ess Enter.		
0pt 1 - - -	Plan ID 107 107 107 107 107 107	Message Id MPS0003 MPS0004 MPS0005 MPS0006 MPS0001 MPS0007	Description Review / Cancel Open Order Inadequate Lead Time Past Due Receipts Reschedule In Exceeded Maximum Reorder Qty.	
				Bottom

Figure 6-21: Display Action Messages selection screen

This screen displays when you press Enter from the Display Action Messages prompt screen. This screen lists by product or action message, the action messages created when you generate the MPS, MRP, or both depending on your entries on the previous screen. Select a product or action message and then press Enter to view further information.

Message ID Description Company and		· · · · · : · · · · · :	107 MPS0003 Review / C IS1	Cancel ISW1		
Type Produc MPS PROD21 MPS PROD21		Size	Quantity 75.0000 150.0000	um Ea Ea	Start Date 12/11/1997 12/12/1997	Due Date
						Bottom
F2=Function	keys F3=Exit	F10=QuikAc	cess F24=M	lore ke	ys	I

Figure 6-22: Display Action Messages screen

This screen displays when you select an action message and press Enter from the Display Action Messages selection screen. Use this information to create or adjust purchase orders and manufacturing batches.

Notes

Part 7 Purging Information

7

The part consists of the following topics:	
Торіс	Page
Overview of Purging Information	7-2
Purging Plans	7-3
Purging Rough Cut Capacity Information	7-5
Purging Forecasts	7-7
Purging Action Message History	7-9
Resetting the Batch Number	7-10

Overview of Purging Information

Infinium MP provides several purge options to assist in cleaning up files and creating disk space.

After you complete this part, you should be able to purge details from:

- Material Requirements Plans
- Master Production Schedules
- Rough Cut Capacity information
- Forecasts
- Action Messages

You should also be able to reset the Infinium MP batch identifier.

Purging Plans

After you have used your plans, use this option to delete the plan detail information to make room for future MPS/MRP plans. When you purge a MPS/MRP plan, the system saves the selection criteria so you can generate the plan again at a later date.

Use the menu path below.

- Utilities
- 1/02/98 10:10:40 Purge MPS/MRP Plans MPGPPSD MPDPPSD Position to . . . Company _____IS1 + Warehouse _____ISW1_ + Plan ID Select one or more of the following. Then press Enter. Opt Company Warehouse Plan ID Description 108 PLAN DESCRIPTION 108 1 IS1 IS₩1 111 PLAN DESCRIPTION 111 IS1 ISW1 _ 109 PLAN DESCRIPTION 112 IS2 IS₩2 _ IS₩4 110 PLAN DESCRIPTION 110 IS2 Bottom F2=Function keys F3=Exit F4=Prompt F10=QuikAccess F18=Message line
- Purge MPS/MRP Plans [PMPSMRPP]

Figure 7-1: Purge MPS/MRP Plans selection screen

To sort the list of existing plans, complete the *Company*, *Warehouse*, or *Plan ID* fields. Type any character beside the plan or plans to purge and then press Enter.

Confirming Purging MPS/MRP Plans

This screen displays after you select a plan from the Purge MPS/MRP Plans selection screen.

		Confirm Delete of MPS/MRP	Plan	
		confirm your choice for del cancel your choice for dele		
Opt Compa IS		Plan ID Description 108 PLAN DESCRIPTIC	N 108	
				D
				Botto
		510 0 11 0 510 0		
F2=Functio	n keys F3=Exi	t F10=QuikAccess F12=Canc	el F24=More keys	

Press Enter to complete the purge or press F12 to cancel.

Purging Rough Cut Capacity Information

Use this option to purge rough cut capacity information from the system. Use the menu path below.

- Utilities
 - ▼ Purge Rough Cut Capacity [PRCC]

0pt	Plan ID	Description	Run Date	Run Time	
_	3		09-12-1996	8:13:43	
_	16		09-12-1996	7:49:28	
_	17		09-12-1996	7:58:57	
_	24		09-12-1996	8:15:21	
_	25		09-12-1996	8:15:33	
_	27		09-12-1996	7:59:01	
_	28		09-12-1996	8:14:13	
_	30		09-12-1996	8:00:22	
_	32		09-12-1996	8:00:33	
ī	93	SUNDAE/SUNDAE2 ONLY	03-18-1997	9:33:43	
					More
					More

Figure 7-3: Rough Cut Capacity Purge selection screen

Type any character to select the plan or plans that the system should purge and then press $\fbox{\text{Enter}}$.

Confirming the Rough Cut Capacity Purge

		Confirm Del	ete	
	-	confirm your choice cancel your choice		
Opt Plan	n ID Descrip 93 SUNDAE/	tion SUNDAE2 ONLY	Run Date 03-18-1997	Run Time 9:33:43
				Botton
F2=Functio	on keys F3=Ex	it F10=QuikAccess	F12=Cancel F24=M	ore keys

Figure 7-4: Rough Cut Capacity Confirmation screen

To accept the conditions of this purge, press $\boxed{F22}$. To cancel the purge, press $\boxed{F12}$.

Purging Forecasts

Use this option to purge records from the Forecast file.

Use the menu path below.

- Utilities
 - Purge Forecast [PF]

1/02/98	10:17:38	Furge	Forecast	MPGMFB	MPDMFB
			<u>IS1</u> + ISW1 +		
Forecast T	уре		+		
 F2=Functio	n keys F3=Exi	t F4=Prompt	F10=QuikAccess	F18=Message	line
	_			U	I

Figure 7-5: Purge Forecast selection screen

Define the parameters of the forecast purge using this screen. You can purge by company, warehouse, product range, date, or forecast type. The only required field is the *Company* field.

To purge records for all warehouses within one company, press FieldExit on the *Warehouse* field.

To purge records for only one product, complete the *Beginning Product* field and the *Size* field, if applicable.

To purge records for one day, complete only the Start Date field.

Press Enter once you complete this screen to access the Forecast Purge Confirmation screen.

Confirming the Forecast Purge

1/02/98	10:25:26	Purge Forecast	MPGMFB	MPDMFB
	-	confirm your choice for dele cancel your choice for delet		
Company .		: ISI		
Warehouse		: ISW1		
Beginning	Product	: All Products		
Start Date	••••••	: All Dates		
Forecast T	уре	: All Types		
	n keys F12=Can	ncel F22=Delete F10=QuikAco	cess F18=Messag	e line

Figure 7-6: Purge Forecast Confirmation screen

To accept the conditions of this purge, press $\boxed{F22}$ and to cancel the purge press $\boxed{F12}$. If you press $\boxed{F22}$, the system returns you to the Purge Forecast selection screen. You can submit a purge for another forecast type or warehouse from the Purge Forecast selection screen.

Once you press [F3], the system submits the purge job. Also, before the system can perform the purge, all users must be out of the *Work with Forecast Description* and *Work with Forecast* options. If you submit the job when a user is in either of these options, the system sends a message to the system operator and resubmits the job to batch. The system then terminates the first job.

Purging Action Message History

This option displays all plan identifiers that have action message audit trails. The run dates and times of these plans display on the screen.

Use the menu path below.

Utilities

		ore of th	e following.	. Then pr	ress Enter.		
-		Descript			Run Date	Run Time	
1	107 111		CRIPTION 107 CRIPTION 111		12/26/1997 12/30/1997		
_	111		CRIPTION 111		12/30/1997		
							Bottom

▼ Purge Action Message Audit File [PAMAF]

Figure 7-7: Purge Action Message Audit File selection screen

To select a plan for the purge, type **1** beside it and press Enter. Once the system submits the job, **PURGED** displays beside the records selected for purging.

Resetting the Batch Number

Use this option to reset the batch number in Infinium MP. This only affects batch numbers created by Infinium MP.

Use the menu path below.

- Utilities
 - Reset Manufacturing Batch Number [RMBN]

1/02/98	10:28	:06 Res	et Manufact	uring Batch Numb	er PFGBNM	PFDBNM
Company				<u></u> 1\$1 +		
Warehouse .				<u>ISW1</u> +		
		Fa F i	E 4 B	510.0.11	510 II	
F2=Function	keys	F3=Exit	⊦4=Prompt	F10=QuikAccess	F18=Message	line

Figure 7-8: Reset Manufacturing Batch Number screen

After you type the appropriate values in the *Company* and *Warehouse* fields, press Enter.

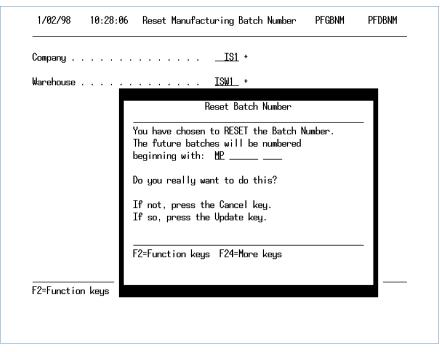


Figure 7-9: Reset Batch Number Verification window

Type the new batch identifier in the *Reset Batch Number* field. Press Enter to reset or [F12] to cancel.

Notes

Appendix A Infinium MP Reports

A

The part consists of the following topics:

Торіс	Page
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Printing the Master Production Schedule

Use this option to print the Master Production Schedule.

Use the menu path below.

- Master Production Scheduling
 - MPS Generation Selection [MPSGS]

	nange 3=0	Copy 4=Dela	ete 6=Prin	t Select	ion Criteria	э	
		D . T D	.				n Authorized
Opt Co		Plan ID	Descriptio		~7	Flag	MPS
-	IS1 ISW1		PLAN DESCR			Y	Y
-	IS1 ISW1		PLAN DESCR			Y Y	N N
_	IS1 ISW1 IS2 ISW2		PLAN DESCR			r Y	N
_	TS2 TSW2		PLAN DESCR			r Y	
-							
							Bottom

Figure A-1: MPS Generation selection screen

Complete the screen as described in the "Master Production Scheduling" part.

MPGMSPP	MPTMSP			MASTER	PROD	UCTION	SCHE	DULE		PAGE 1	11/02/01 4:	03:02 PJT
	S2K Ware S2KMFGP1 tifier	GL	MFG PR	ODUCT #1 OR S2K'S WAR	EHOUSE 1	Plan Date	11/02/200	1	Planne	er act Family		
Starting	Inventory		20.0000	Inventory Un	it of Meas	ure GL			FIGU	Buyer		
Safety St	ock			Lead Time		9.00	Lot Siz		00 Lot	Size Technie	que L	ot-for-lot
Order Mul	tiple Quant	tity	250.0000	Minimum Q	uantity	Dowind Cut	200.0		tion Dulo	2 Gustomore	Ordona	
Time Fenc	e 1 Descr e 2 Descr e 3 Descr ssage Perio	ription	ANYTHING				off	6 Consumpt	tion Rule tion Rule	3 Greater of 1 Forecast	f Cust Ord/	Forecast
	53.0	1	0 / 0 0	0/02/00/10//	10/0	E	10/00	10/10	10/02	10/20	0 (1 0	
	PAST	L DOR I	1	0/03/2001 10/0 2		4					9	10
Forecast			50.0000	25.0000	75.0000	100.0000			100.0000	150.0000	275.0000	20.0000
Orders			100.0000	50.0000			3.0000		58.0000	45.0000	23.0000	
Receipts Usage	54.	.0000	100.0000	54.0000	108.0000	54.0000	54.0000	65.0000				
Firm Pld O			F 4 0000	54.0000	54.0000	104 0000				165.0000		
Available Plan ATP	74.	.0000		132.0000 58.0000	294.0000 162.0000	194.0000	98.0000 51.0000	8 0000	42 0000	15.0000 120.0000	237.0000	20.0000
Suggested	MPS							52.0000	46.0000		197.0000	
ACTION MES												
Message 1d MPS0002	Descriptio Resched		.+		Quant 54.0	0 0 0 mm	10/06	Date Due 2001 10/09				
MPS0005			ad Time		52.0	000 GL	9/26/2	2001 10/09 2001 10/09 2001 10/16	9/2001			
MPS0005					46.0		10/03/2	10/16	5/2001			
MPS0006	Past Du	ie Rece	eipts 		54.0	000 GL						
<u>RECEIPTS</u>						REG	DUIREMENTS					
VENDOR	DUE	ORDER	R NUMBER	QUANTITY		~	UIRED R	~	USTOMER NUN	IBER ORDE	R NUMBER D	
NUMBER	DATE			DUE	WAREH	OUSE DAT	E Q	UANTITY			W	AREHOUSE
	9/26/2001	PPSEP	Т970001	54.0000	S2KW1	10/0	2/2001 100	0.0000 1		000000	37 S2KI	W1
	10/02/2001			100.0000	S2KW1			0.000		FTYP1	S2KI	
	10/03/2001	PPOCT	97 0012	54.0000	S2KW1		3/2001 50 03/2001 2	0.0000 1		0000000 FTYP1	38 S2KI S2	
	10/04/2001	PPOCT	97 0001	54.0000	S2KW1	10/	U3/2001 .	23.0000		FIIPI	52	T/ AA T
	10/04/2001			54.0000	S2KW1	10/0	4/2001 75	5.0000		FTYP1	S2KI	V1
					ﯩﻠ. ﯩﻠ. ﯩﻠ. ﯩﻠ. ﯩﻠ. ﯩﻠ.	*** ᠮ᠊ᠭ		0 D m +++				

********* END OF REPORT *********

Printing the MPS Exception Reports

Use this option to create an exception report on a MPS that you generated using the *MPS Generation Selection* option.

Use the menu path below.

- Master Production Scheduling
 - ▼ MPS Exception Reporting [MPSER]

sere	ct one or mo	pre ot the to	llowing. Then press Enter	
Opt	Co Whse	Plan ID	Description	Authorized MPS
1	IS1 ISW1	107	PLAN DESCRIPTION 107	Y
-	IS1 ISW1	108	PLAN DESCRIPTION 108	Ň
_	IS1 ISW1	111	PLAN DESCRIPTION 111	N
_	IS2 ISW2	109	PLAN DESCRIPTION 112	
_	IS2 ISW4	110	PLAN DESCRIPTION 110	
				Bottom

Figure A-2: MPS Exception Reporting selection screen

Only generated Plan IDs display on this screen.

Type any character in the *Opt* field to select one or more Plan IDs to include on the report. After selecting the plans, press Enter to continue to the next screen.

Company	. : IS1		
Warehouse			
Plan Identifier	. : 000000107		
Plan Description	. : PLAN DESCRIPTI	ON 107	
Beginning Product		+	
Ending Product		+	
Planner	+		
Product Family			
Buyer	+		
Number of Buckets	<u>12</u>		
Summary Only	Y (Y=Yes, N=N	o)	
Print Action Messages on the Pl	an . Y (Y=Yes, N=N	0)	
Only Select Product with			
Suggested MPS	N. (Y=Yes, N=N	n)	
Past Due Demand/Receipts			
Available Greater Than Minimu			
Available Greater Than Maximu			
Available Less Than Minimum .			
	pompt E8=Ppipt E24=	Mone keye	
		nore keys	
			•

Figure A-3: MPS Exception Reporting screen

Type the criteria you want to use in generating this report in the fields above.

Under the caption Only Select Product with, select one or more options.

Press F11 to change the display from product selection to formula selection.

The MPS Exception report and the Master Production Schedule report refer to the same listing. Refer to the Master Production Schedule printout.

Printing the Material Requirements Selection Report

Use this option to generate the Material Requirements Selection report, the Production Budgeting report, and the Zero Cost Exception report.

Use the menu path below.

- Material Requirements Planning
 - MRP Generation Selection [MRPGS]

y Warehouse ISW1 ISW1 ISW1 ISW1	Plan ID 107 108	Description PLAN DESCRIPTION 107 PLAN DESCRIPTION 108	Authorized MPS Y
ISW1 ISW1	107	PLAN DESCRIPTION 107	Y
ISW1			-
	108	DIAN DESCRITTION 108	
TSM1			N
1041	111	PLAN DESCRIPTION 111	N
ISW2	109	PLAN DESCRIPTION 112	
ISW4	110	PLAN DESCRIPTION 110	
			Bottom

Figure A-4: MRP Generation Selection screen

To generate an MRP, type **1** in the *Opt* field next to the plan you want to process and press F8.

1/02/98 10	:55:13	MRP Genera	atic	n Selection	MPGPSM	MPDPSM
Company Warehouse(s) Plan ID			18	IS1 W1 107		
Summary Only Number of Buck				(Y=Yes, N=No) 2_		
Planning Horiz Present Cuto Future Cutof	ff Period			72		
Reset Low Leve	l Numbers		N	(Y=Yes, N=No)		
Print the Mate Print Action M Automatically Batch Status	essages or Create Rec	the Plan . s/Batches .	Y	(Y=Yes, N=No) (Y=Yes, N=No) (Y=Yes, N=No) (0=Firm Planner 2=Work in Proc		ed
F2=Function ke	ys F3=Exi	t F8=Generat	e	F10=QuikAccess	F24=More keį	js
						I

Figure A-5: MRP Generation Selection screen

Complete fields as described in the "Working with Material Requirements Planning" part.

The system generates the report after you press $\fbox{F8}.$

An example of the Material Requirements Selection report follows.

11/21/01		1					AN SELE			PAGE	PJT
Company	S2K War	ehouse S2KW	L								
Product F	RAW11	2	PROCESS RA	W MATERIAL-v	water						
Plan Ident	tifier	2	PLAN FOR S	2K'S WAREHOU	JSE 1	Pla	n Date	11/	03/2001		
Planner											
		542.0168	Inventory	Unit of Meas	sure GL						_
afety Sto			Lead Time		4.00	Lot Size	1000.0000	Lot Size T	echnique	1 Lot-f	or-l
		tity 100.0000	Minimum Qu	antity	500.0000) Maximum Quai	1000.0000 ntity f Period				
		ff Period 10	Pegging Cu	toff Days	90) Tubuu dubufu	6 Decided				
lanning H	Horizons:		Present Cu	itoff Period		Future Cutof:	I Period				
	PAS	T DUE 10/02/2001 1	0/03/2001 10/	04/2001 10/05	/2001 10/06/2	001 10/09/2001	10/16/2001 10/2	3/2001 10/3	0/2001 12/1	3/2001	
	110	1					6				
dependent	. Demand	35.5557 101.399'					91.7487				
pendent I					37.0224						
- ceipts											
ojected A	Available	470.9054 369.505'	7 222.4133	127.3044	91.7487	91.7487					
ojected C	Dnhand	506.4611 405.0614	4 225.8162	130.7073	97.1516	97.1516	3.4029 3.	4029 3	.4029	3.4029	3.4
	der Receip						32.1528				
	der Releas	e 									
<u>CTION MESS</u> Message Id	<u>SAGES</u> 1 Descrip			Quantity	Z UM	Start Date	Due Date				
ECEIPTS						REQUIREM	ENTS				
VENDOR	DUE	ORDER NUMBER	QUANTITY	DETAIL	REQUIRED			NUMBER	ORDER NUM	IBER	DETA
UMBER	DATE		DUE	WAREHOUSE	DATE	QUANTITY				WAR	EHOU
					9/25/2001	35.5557	PPSEPT970	001		S2KW	1
					10/02/2001			800		S2KW	1
					10/02/2001					S2KW	
					10/03/2001					S2KW	
					10/03/2001	35.5557				S2KW	
					10/03/2001	35.5557				S2KW	
					10/03/2001			012		S2KW	
					10/03/2001					S2KW	
						51.8607		001		S2KW	
					10/04/2001					S2KW	
						35.5557				S2KW	
					10/10/2001	35.5557	PPOCT97 0			S2KW	

10/11/2001

10/13/2001

35.5557

PPOCT97 0013

171.9088 MX1004970011 S2KW1 ********** ENDOFREPORT ********* A-8

S2KW1

Printing the Material Requirements Exception Report

Use this option to create an exception report on a MRP you generated using the *MRP Generation Selection* option.

Use the menu path below.

- Material Requirements Planning
 - MRP Exception Reporting [MRPER]

	e option, Select	press Enter	·.			
Opt 1		Warehouse ISW1	Plan ID 107	Description PLAN DESCRIPTION	107	Authorized MPS Y
						Bottom

Figure A-6: MRP Exception Reporting selection screen

Only generated Plan IDs display on this screen. Type any character in the *Opt* field to select one or more Plan Ids to include on the report.

Under the caption Only Select Product with, select one or more options.

Press F11 to change the display from product selection to formula selection.

 Company	:	IS1			
Warehouse		TSW1			
Plan Identifier		000000107			
Plan Description	:	PLAN DESCR	IPTION 107	,	
Beginning Product				+	
Ending Product				+	
Planner		+			
Product Family		+			
Buyer			+		
Number of Buckets		_12_			
Summary Only		ΎΥ=Yes,	N=No)		
Print Action Messages on the	Plan.	Ύ (Y=Yes,	N=No)		
Only Select Product with					
Planned Order Receipts		N (Y=Yes,			
Past Due Demand/Receipts .		N (Y=Yes,	N=No)		
Available Greater Than Mini	mum .	N (Y=Yes,	N=No)		
Available Greater Than Maxi	mum .	N (Y=Yes,	N=No)		
Available Less Than Minimum	ı	N (Y=Yes,	N=No)		
F2=Function keys F3=Exit F4	⊨Prompt	F8=Print I	24=More k	æys	

Figure A-7: MRP Exception Reporting screen

Type the criteria you want to use in generating this report in the fields above.

The system generates the report after you press [F8].

Under the Only Select Product with column, select one or more options.

The MRP Exception report and the Material Requirements Plan Selection report refer to the same listing.

Printing the Product Requirements Report

The Product Requirements report identifies the periodic supply and demand of raw materials and/or products.

The factors affecting supply include purchasing and manufacturing orders. Those affecting demand include customer and manufacturing orders. For each raw material/resource and product you select, the report provides required quantities for the periods you specify for each type of supply and demand, a net total for each period, and a net total for all periods.

Use the menu path below.

- Advanced Planning Report/Display
 - Product Requirement Report [PRR]

Warehouse From Produ		· · · · · ·	<u>ISW1</u> + +
Products, Report Typ	hortage Repor Raw Materials e ing Dates	or Both . 	(1=Products, 2=Raw Materials, 3=Both (1=Summary, 2=Detail)
F2=Functio	n keus F3=Ex	it F4=Prom	ot F8=Print F24=More keys

Figure A-8: Product Requirement Report prompt screen

The system requires entries in *Critical Shortage Report* and *Products, Raw Materials* or Both, and Report Type fields.

Leave the *Company* and *Warehouse* fields blank to produce a report for all companies and warehouses. Complete *Company* and leave *Warehouse* blank for a

report of all warehouses for the company you specify. You must complete at least one *Period Ending Dates* field.

To print a report of all raw materials and/or products, leave the *From Product* and *To Product* fields blank. To produce a report for a single item, enter the same identifier in both fields.

If you are using the Size code as part of your product ID, the report will include all sizes of any products you select.

Type \mathbf{Y} in the *Critical Shortage Report* field to produce a report that lists only items with negative totals in one of the specified periods.

After making your entries, press F8 to run the report.

This report uses the MPS/MRP Column in *Control Files*, *Work with Inventory Type File* option in Infinium IC.

A sample report is on the next page.

MPGPRR MPTPRR 11/07/01 9:27:24	PRODUCT	REQUIREMENTS	REPORT	PAGE 1 PJT
Company: S2K Warehouse: S				
Product RAW10	LABOR	Min: Max:	Onhand Inventory: HR Other Inv	entory: HR
	10/30/01 11/30,	01 0/00/00 0/00/00 0/00/0	0/00/00 0/00/00 0/00/00 0/00/00) 0/00/00 Total:
WORK IN PROCESS (BATCH USAGE)	8.0368			8.0368
SCHEDULED USAGE (BATCH USAGE)	18.2738			18.2738
FIRM PLAN ORDER (BATCH USAGE)	12.0435			12.0435
* Projected Inventory Total	38.3541- 38.3	541-		38.3541-
	 ********** E	ND OF REPORT *	*******	

Printing the Resource Load Summarization Report

The *Resource Load Summarization* option provides, in either display or report format, information about selected resources from either scheduled or in process batches in Infinium MC.

Information provided includes:

- Planned usage date
- Resource
- Resource description
- Scheduled quantity
- Daily capacity
- Percent utilization

You also have the option of writing the information to a work file which you can transfer to a personal computer for further processing.

Use the menu path below.

- Advanced Planning Report/Display
 - Resource Load Summarization [RLS]

0		T01 .		
Company		. <u>IS1</u> + . ISW1_ +		
Warehouse			1 1-01 11	
Batch Status		-	anned, 1=Schedule	90
Resource Selection .			Process, 3=All)	
		• _ * _ * _	· · - · - ·	
Kesource Write to work file .		. <u>N</u> (Y=Yes, N=	Ma)	
Run options				
Summarize Options		,	z-Display/ æ/Date, 2=Date)	
Date Range			ervale, z-valer	
F2=Function keys F3=E	xit F4=Prom	ot F8=Print F24	-More keus	

Figure A-9: Resource Load Summarization screen

The system requires entries in the *Batch Status, Write to work file, Run options,* and *Summarize Options* fields.

Leave the *Resource Selection* and *Resource* fields blank to include all resources on the display or report.

You can display the information provided by this option or you can print the Resource Load Summarization report.

Type **2** in this field to display the information, beginning with the screen on the following page.

To print the report, type **1** in the *Run options* field and press **F8**. A sample report is on the following page.

RESOURCE LOAD REPORT

11/06/01 13:58:22

Planned Usage Date	Resource	Size Description	Scheduled Quantity		Daily Capacity	Percent Utilization
9/25/01 9/26/01	RAW10 RAW10	LABOR LABOR	.8265 .8265-	HR HR		
10/02/01	RAW10	LABOR	7.2406	HR		
10/04/01	RAW10	LABOR	4.0184	HR		
10/09/01	RAW10	LABOR	4.0184	HR		
10/11/01	RAW10	LABOR	4.0184	HR		
10/13/01	RAW10	LABOR	4.0184	HR		
10/13/01	RAW10	LABOR	.9988	HR		
10/26/01	RAW10	LABOR	1.9976	HR		

PJT

Printing the Rough Cut Capacity Report

This report provides information from the Master Production Schedule about capacity needs for key materials and resources. You can limit the selection of resources to specified resource types. You can also base the selection of resources on the standard formula for a product or use the rough cut formula specified in the formula record to limit the resources selected.

This report includes the following information:

- Period, including start and end dates
- Resource capacity, as defined in the Item Warehouse file
- Planned usage
- Prior committed quantity
- Percent usage with a threshold flag
- Cumulative percent usage with a threshold flag

Use the menu path below.

- Advanced Planning Report/Display
 - Rough Cut Capacity Report [RCCP]

1/02/98	11:03:23	Rough Cut	Capacity Report	MPGRCB	MPDRCB
Warehouse	 		<u>IS1</u> + + +		
Using RCCP Type of Re Critical R Number of Alert Perc Alert Perc	ula Formula source esources Only Periods entage of Usa ent of Cumula ut to Workfil		Y (Y=Yes, N=No) N (Y=Yes, N=No) * - * - * N (Y=Yes, N=No) 		
F2=Functio	n keys F3=Ex	(it F4=Prompt	F8=Print F24=Mor	re keys	

Figure A-10: Rough Cut Capacity Report selection screen

The system requires entries in the *Plan ID*, *Using Formula*, *Using RCCP Formula*, *Critical Resources Only*, and *Write Output to Workfile* fields.

Using RCCP Formula

Type \mathbf{Y} in this field if you want the system to use the rough cut formula rather than the standard formula for generating this report or display.

Use the *Work with Formula Description* option on the *Formula Management* menu in Infinium PF to enter a formula ID for the Rough Cut Capacity Plan formula.

The system generates the report after you press F8.

MPGRCC	MPTRCC	ROUGH	СИТ	САРАСІТҮ	PLANNING
11/06/01	13:58:44				

Company	S2		S2KW1 Plan ID	2 PLAN	I FOR S2K'S WAREHOUSE	1			
Resourc			LABOR						
Daily C	apacity	HR							
Period	From	То	Capacity	Planned	Prior	Percent	Alert	Cumulative	Alert
	Date	Date		Usage	Committed	Usage		Percent	
1	10/02/2001	10/02/2001			7.2406				
2	10/03/2001	10/03/2001			4.0184				
3	10/04/2001	10/04/2001			9.0471				
4	10/05/2001	10/05/2001							
5	10/06/2001	10/06/2001							
б	10/09/2001	10/13/2001		.1644	13.0540				
7	10/16/2001	10/20/2001							
8	10/23/2001	10/27/2001			4.9940				
9	10/30/2001	12/12/2001		14.0271					
10	12/13/2001	1/25/2001							

MPGRCC

Printing Action Messages

Use this option to print action messages created when you generate the MPS and MRP. These messages prompt you to create new purchase or manufacturing orders, or make changes to existing orders to bring receipts into phase with requirements.

Use the menu path below.

- Advanced Planning Report/Display
 - Print Action Messages [PAM]

Plan IV .		 		- *		
Print sequ	ience	 	_ (1=Pro	duct, 2=A	ction Messa	ge)
Action Mes	sage Type	 	<u>3</u> (1=MPS,	2=MRP, 3	=Both)	
Planner Co	de	 				
Product Fa	amily	 	•			

Figure A-11: Print Action Messages prompt screen

The system requires entries in the *Plan ID*, *Print sequence*, and *Action Message Type* fields.

If you complete both the *Planner Code* and *Product Family* fields, both fields must match in the Item Warehouse file in order for a product to be in the report.

After completing this screen, press F8 to print the report. Depending on your choice of a product report or an action message report, a corresponding window displays asking for either a product range or an action message range. If you wish to include all action messages or all products, leave the fields blank and press F8.

A sample of a report is on the following page.

MPGAMP 11/06/			Print Action	Message				PAGE	1
Compa Wareh	ny Nouse								
Type	Message Id	Description	Quantity		Start Date	Due Date	Formula		
Produ	ict	: S2KMFGP1	GL	MFG PRODUCT	#1				
MPS	MPS0005	Inadequate Lead Time	52.0000	GL	9/26/2001	10/09/2001	S2KFORM1		
MPS	MPS0005	Inadequate Lead Time	46.0000	GL	10/03/2001	10/16/2001	S2KFORM1		
MPS	MPS0002	Reschedule Out	54.0000	GL	10/06/2001	10/09/2001	S2KFORM1		
MPS	MPS0006	Past Due Receipts	54.0000	GL			S2KFORM1		
Produ		: S2KMFGP3	DR	MFG PRODUCT	#3				
MPS	MPS0005	Inadequate Lead Time	14.4755	GL	9/25/2001	10/09/2001	S2KFORM5		
MPS	MPS0002	Reschedule Out	1247.1049	GL	10/05/2001	10/09/2001	S2KFORM5		
Produ	ict	: RAW12		PROCESS RAW	MATERIAL				
MRP	MPS0004	Open Order	21.7216	LB			S2KFORM5		
MRP	MPS0004	Open Order	45.3030	LB	10/02/2001		S2KFORM5		
MRP	MPS0005	Inadequate Lead Time	21.7216	LB			S2KFORM5		
MRP	MPS0001	Reschedule In	15.0000	LB	10/03/2001	10/02/2001	S2KFORM5		
MRP	MPS0001	Reschedule In	5.0000	LB	10/05/2001	10/04/2001	S2KFORM5		
Produ	ict	: RAW17		PROCESS RAW	MATERIAL				
MRP	MPS0004	Open Order	7802.1964	-			S2KFORM5		
MRP	MPS0005	Inadequate Lead Time	7802.1964	-			S2KFORM5		
Produ	ict	: S2KMFGP4	5G	MFG PRODUCT	#4				
MRP	MPS0004	Open Order	1.1250	GL			S2KFORM5		
MRP	MPS0004	Open Order	.1250	GL	10/02/2001		S2KFORM5		
MRP	MPS0005	Inadequate Lead Time	1.1250	GL			S2KFORM5		

Printing Infinium Advanced Planning Forecast Reports

Use the *Import Forecast* option to import forecasts from the Common Services Transfer file or the Advanced Planning Transfer file.

Printing the Imported Forecast Listing and the Import Forecasts Exceptions Reports

This option requires exclusive access to the data files. Make sure no other import related options are being run prior to executing this option.

Use the menu path below.

- Forecast Import
 - ▼ Import Forecast [IF]

6/01/00	11:05:40	Import	Forecast	MPGIFB	MPDIFB
into t Exclus to rec relate	will be submitted to the Imported Forecast sive access to the Im ceive the data. Make ed option will run du Receive key to submi	t file. mported Fo sure no uring this	precast file is requ other Forecast Impo s receiving process.	uired ort	
Point of C Import fro	nigin	· · · <u>1</u>	<u>1PINFINIUM</u> 1 <u>0</u> 0=Common Servi	ices, 1=MP T	rf file
F2=Functio	on keys F3=Exit F6=	Receive	F10=QuikAccess F18	}=Message li	ne

Figure A-12: Import Forecast screen

Importing Forecasts

Make sure no other user is performing any *Forecast Import* option when you execute this option. *Forecast Import* options include: *Import Forecasts, Work with Imported Forecast, Post Imported Forecast, and Purge Imported Forecast File.*

Verify the default entries on the screen and change them if necessary. Press F6 to execute the import. Press F3 to cancel and exit.

If your data source is the MP Transfer file, MPPTF, be aware that the system clears this file of all data after an import, even if there are errors.

Regardless of your data source, the system automatically generates the Import Forecast Exception report when you perform this option. The report heading will differ by data source. It will be either the Import Forecast Exceptions report or the Import Forecast via Common Services Exception report. The system also generates the Imported Forecast Listing report.

You can also generate the Imported Forecast Listing report by pressing F8 on the Work with Imported Forecast screen.

MPGISS 6/11/0		'IFL 26:22				IMPORTED	FORECAS	r L	ISTING				PAGE	1 PG
	WHSE	PRODUCT	SIZE	FCST TYPE	FORECAST DESCRIPTION	FORECAST DATE	QUANTITY		STATUS	ORIGIN	USER ID	TRANS ID	TRANSACTION DATE	
COMP2		ITEM21	EA	FUTUR	FORECASI DESCRIPTION	00970601	17000.0000	KG	NEW	ANALYST 01	PG ID	024786	06-11-2001	
000012	WIIDEZ	110021	DA	10101		00970701	19000.0000	KG	TILL II	ANALIDI UI	10	021700	00 11 2001	
						00970801	19000.0000	KG						
						00970901	22000.0000	KG						
						00971001	16000.0000	KG						
COMP2	WHSE2	ITEM22	EA	PROMO		00970601	700.0000	KG						
000012	WIIDEZ	110022	DA	110000		00970701	650.0000	KG						
						00970801	600.0000	KG						
						00970901	550.0000	KG						
COMP4	WHSE4	ITEM41	EA	FUTUR		00970601	17000.0000	KG						
00112 1	111021	1101111	211	101010		00970701	19000.0000	KG						
						00970801	19000.0000	KG						
						00970901	22000.0000	KG						
						00971001	16000.0000	KG						
COMP4	WHSE4	ITEM42	EA	PROMO		00970601	700.0000	KG						
						00970701	650.0000	KG						
						00970801	600.0000	KG						
						00970901	550.0000	KG						
						00971001	500.0000	KG						
COMP5	WHSE5	ITEM51	EA	FUTUR		00970601	17000.0000	KG						
						00970701	19000.0000	KG						
						00970801	19000.0000	KG						
						00970901	22000.0000	KG						
						00971001	16000.0000	KG						
			***** RECORI	OS SELEC	CTED . : 00018									
			***** RECORI	OS IMPOR	RTED . : 00024									
						******	END OF REPORT	* * * * * *	* * * *					

This is the Import Forecast using the Infinium MP Transfer file – Imported Forecasts Listing. This listing displays all successfully imported forecast records. Remember the *Origin* and *Transaction ID* field values. In order to subset using the transaction ID in the *Work with Imported Forecast* option, you must obtain that information from this report.

A-25

ICS 12/01		FIFL :00:54			IMPORTED	FORECAST L	ISTING						PAGE
				FCST		FORECAST							TRANSACTION
CO T	WHSE	PRODUCT	SIZE	TYPE	FORECAST DESCRIPTION	DATE	QUANTITY	UM	STATUS	ORIGIN	USER ID	TRANS ID	DATE
NF .	INF	PROD20	LB	*RR01		20010101	100.0000	LB	NEW	ANALYST 05	PG	025136	06-12-2001
						20010104	100.0000	LB					
						20010105	7000.0000	LB					
						20010106	5000.0000	LB					
						20010107	15000.0000	LB					
						20010110	250.0000	LB					
						20010114	200.0000	LB					
						20010121	10000.0000	LB					
						20010131	400.0000	LB					
						20010214	200.0000	LB					
						20010228	500.0000	LB					
INF 3	INF	PROD21	LB	FUTUR		20010731	5.0000	LB					
						20010801	10.0000	LB					
						20010802	7.0000	LB					
						20010803	12.0000	LB					
						20010807	15.0000	LB					
						20010814	25.0000	LB					
						20010821	20.0000	LB					
						20010828	22.0000	LB					
						20010901	50.0000	LB					
						20011001	50.0000	LB					
						20011101	75.0000	LB					
						20010315	200.0000	LB					
						20010331	250.0000	LB					
						20010401	600.0000	LB					
						20010413	500.0000	LB					
INF :	INF	PROD20	LB	RETAL		20010801	200.0000	LB					
						20010802	100.0000	LB					
						20010803	250.0000	LB					
						20010804	300.0000	LB					
						20010805	100.0000	LB					
						20010815	1000.0000	LB					
						20010831	1500.0000	LB					
INF 3	TNF	PROD23	LB	TFR		20011201	10.0000	LB					
		110020	22			20011202	10.0000	LB					
						20011203	10.0000	LB					
						20011204	10.0000	LB					
						20011205	10.0000	LB					
						20011206	10.0000	LB					
INF :	TNF	PROD25	LB	*RR01		20010501	2000.0000	LB					
	1141	110025		TCICO I		20010502	1000.0000	LB					
INF :	TNF	BLSPRODUCT	N/A	SPEC		20011223	10.0000	LB					
		52011000001	IN / Pi	. DI DC		20011223	10.0000	LB					
						20011230	10.0000	LB					
INF :	TNF	PRODUCT5	EA	FUTUR		20010105	1000.0000	EA					
INF :		PRODUCIS PROD11	EA	*PG03		20010115	50.0000	LB					
INF :		PRODII PRODII		*PG03		20011101	50.0000	LB	NEW	ANALYST 05	DC	025136	06-12-2001
INF . INFIN:		FRODIT		TFR		00000000	50.0000	дц	TAFPM	MIVALISI US	rg -	020100	00-12-2001
TINE TIN.	T OM			IFR									
						00000000							
					CTED . : 00050 RTED . : 00049								

This is the Import Forecast using AM Common Services - Imported Forecast Listing report. This report displays all successfully imported forecast records.

MPGISS 6/11/01	MPTIFE 15:10:44						
IMPO	RTED FORECAST FIL	LE, MPPIF, CANNOT BE ALLOCATED. ***** NO RECORDS SELECTED ********** END OF REPORT ********					

This is the Import Forecast using the Infinium MP Transfer file – Exceptions report. In this case, the system cannot allocate the Imported Forecast file and no further processing occurs. The system retains data in the Infinium MP Transfer file.

MPGISS	MPTIFE	IMPORT FORECAST	PAGE	1
6/11/01	15:21:10	EXCEPTIONS REPORT		PG

MP TRANSFER FILE, MPPTF, CANNOT BE ALLOCATED. ***** NO RECORDS SELECTED

********* END OF REPORT *********

This is the Import Forecast using the Infinium MP Transfer file – Exceptions report. In this case, the system cannot allocate the Infinium MP Transfer file. No further processing occurs and data remains in the Infinium MP Transfer file.

	MPTIFE 17:26:22	I M P O R T F O R E C A S T EXCEPTIONS REPORT	PAGE	1 PG
TRANSACTIC ItemCode,I ; AVAILABLE ITEM11,11, ITEM12,11, ITEM13,11,	Cocation,UD01 2: 9 GL,RETAL, EA,RETAL,	1 .,UD02,UD03,UD04,UD05,UD06,UD07,UD08 THERE MUST BE AT LEAST ONE QUANTITY FIELD. MINIMUM NUMBER OF FIELDS EX ALL THE ASSOCIATED DATA RECORDS ARE REJECTED: 1,,,,,GL,16000,15500,15600,15550,15410,15264,18625,15772,11989,21982,15813,15059 1,,,,,EACH,17217,19275,39433,22884,16410,18264,28625,22772,24989,21982,21813,21059 1,,,,,LB,1000,1000,1100,900,970,970,900,970,970,900,900	(PECTED:	12
TRANSACTIC ITEM22,WHS		2 COMP2,,,,,,KG,700,650,600,550,5?0 CANNOT DETERMINE QUANTITY. QUANTITY IN ERROR: 5?0 FO	DR PERIOD:	5
TRANSACTIC IT,EM31,WH	-	3 2,COMP3,,,,,,KG,17000,19000,19000,22000,16000 FIELDS MISMATCH. TOTAL FIELD NAMES: 016 TOTAL DATA FIELDS: 01	L7	
		***** RECORDS PROCESSED . : 00018 ***** TOTAL TRANSACTIONS : 00005 ***** TOTAL DATA RECORDS : 00009 ****** TOTAL DATA RECORDS : 00009		

This is the Import Forecast using the Infinium MP Transfer file – Exceptions report. In this example, the files have been successfully allocated and the transfer is complete. The system clears the Infinium MP Transfer file of all data.

MPGICS 6/12/10	MPTIFE 12:07:20	IMPORT	FORECAST EXCEPTIONS	СОММОN	SERVICES	PAGE	1 PG
IMPO	RTED FORECAST FILE, I	MPPIF, CANNOT BE		 		 	

********* END OF REPORT *********

This is the Import Forecast using AM Common Services – Exceptions report. In this example, the system cannot allocate the Imported Forecast file and no further processing occurs.

This is the Import Forecast using AM Common Services – Exceptions report. In this example, the system cannot allocate the Infinium MP Transfer file and no further processing occurs.

MPGICS MPT: 6/12/01 12:0	FE I M 0:54	PORT FORECAS	GT VIA COMMON S EXCEPTIONS REPOR		AGE 1 PG
RECORD NO 50		JSED PROGRAM AMGCRDCS TO) END ABNORMALLY. TRANSFE	R PROCESS TERMINATED.	
		DS PROCESSED . : 00050 DS IN ERROR . : 00001	* * * * * * *	* END OF REPORT *********	

This is the Import Forecast using AM Common Services – Exceptions report. In this case the system successfully allocates the file and the transfer occurs.

Printing Infinium Advanced Planning Post Reports

Use the *Post Imported Forecast* option to post all unposted records from the Imported Forecast file, MPPIF, to the Infinium MP Forecast Database file, MPPMF.

Printing the Imported Forecast Post Exceptions, the Imported Forecast Post, and the Imported Forecast Post and Purge Reports

Use the menu path below.

- Forecast Import
 - Post Imported Forecast [PIF]

	9:10:35	Post Imported Forecast	MPGIFSB	MPDIFSB
-		ted to post all records from le that have NOT yet been pos		
to exe	oute the post.	the Imported Forecast file is Make sure no other Forecast run during this post process.	Import	
Press	Post key to su	bmit the job.		
2=Functio	n keys F3=Exi	t F6=Post F10=QuikAccess F	18=Message line	3

Figure A-13: Post Imported Forecast screen

Posting Imported Forecasts

Make sure no other user is performing any *Forecast Import* option when you execute this option. *Forecast Import* options include: *Import Forecasts, Work with Imported Forecast, Post Imported Forecast, and Purge Imported Forecast File.*

Press F6 to post all unposted records in the Imported Forecast file, MPPIF. The system performs all validations as executed in the *Work with Imported Forecast* option. Press F3 to cancel and exit.

Whenever you post, the system automatically generates the Imported Forecast Post Exceptions report.

If you type 0 in the *Delete of Posted Forecasts* field and Y in the *List Purged Forecast* field in the Infinium MP Control files, the system automatically generates the Imported Forecast Post and Purge report for you whenever you post forecasts.

If you type 1 in the *Delete of Posted Forecast* field and Y in the *List Posted Forecast* field, the system automatically generates the Imported Forecast Post report whenever you post forecasts.

You can also post forecast records via the Work with Imported Forecast option.

MPGIFS 7/22/0		FIFL :29:58				IMP	ORTED	FOREC	AST	POS	Т			PAGE	2 PG
CO INF	WHSE INF	PRODUCT PROD11	SIZE	FCST TYPE FUTUR		DESCRIPTION S FRCST TYPE	FORECAST DATE 11/01/2001 12/01/2001	QUANTITY 50.0000 50.0000	UM LB LB	STATUS NEW NEW	ORIGIN	USER II PG PG	0 TRANS ID 038683 038683	TRANSAC DATE 07/11/ 07/11/	2001
					ORDS POSTI				* * * * * *	**** END	OF REPO	RT ****	* * * * *		

MPGIFS MPTIFSE 7/22/01 9:29:58		M P O R T E D F O R E C A S EXCEPTIONS REPORT	T POST	PAGE 5 PG
	FCST	FORECAST DATE QUANTITY 03/01/2001 ERROR IN WAREHOUSE CODE ERROR IN PRODUCT-SIZE CODE		
INF01	TFR	ERROR IN UNIT OF MEASURE 04/01/2001 ERROR IN WAREHOUSE CODE ERROR IN PRODUCT-SIZE CODE ERROR IN UNIT OF MEASURE	EACH	
INF01	TFR		EACH	
INF01	TFR		EACH	
INF01	TFR		EACH	
INF01	TFR		EACH	
INF01	TFR		EACH	
INF01	TFR		EACH	
INF01	TFR		EACH	
INF01	TFR		EACH	
	***** RECORDS PROCE			
	***** RECORDS IN EF			
		********* END OF REPORT ***	****	

MPGIFS 7/22/01	MP1 10:	'IFL 01:12		ІМРС	RTED	FORECAST	POST	AND	PURGE			PAGE	2 PG			
				FCST			FOREC	CAST								TRANSACTION
CO	WHSE	PRODUCT	SIZE	TYPE	FORECAST	DESCRIPTION	DATE		QUANTITY	UM	STATUS	ORIG	IN	USER ID	TRANS ID	DATE
INF	INF	PROD11		FUTUR	REGION 2	'S FCST TYPE	11/01	L/2001	50.0000	LB	NEW			PG	038683	07/11/2001
							12/01	L/2001	50.0000	LB	NEW			PG	038683	07/11/2001
			***** RECORI ***** RECORI			00130 00047										
			AAAAA RECORI	S POSIE	D	00047										

********* END OF REPORT *********

Printing the Imported Forecasts Purge Report

Use the Purge Imported Forecast File option to purge only posted forecasts.

Purge forecasts of any status using the Work with Imported Forecast option.

It is not necessary to execute this option if you type **0** in the *Delete of Posted Forecasts* field in the Infinium MP Control files.

Use the menu path below.

- Forecast Import
 - Purge Imported Forecast File [PIFF]

5/19/97	9:40:41	Purge Imported Forecast File	MPGIFPB MPDIFPB
		tted to delete all records fro ile that have already been pos	
Exclusi to exec	ive access to cute the purg	o the Imported Forecast file is je. Make sure no other Forecas run during this purge process	required t Import
Press F	^o urge key to	submit the job.	
⁻ 2=Functior	n keys F3=Ex	kit F10=QuikAccess F18=Messag	e line F22=Purge
24-2	SA MW	K <mark>s</mark> cl im dm II w	HQ421 KB S2KCTLS1

Figure A-14: Purge Imported Forecast File screen

Make sure no other user is performing any Forecast Import option when you execute this option. Forecast Import options include: *Import Forecasts, Work with Imported Forecast, Post Imported Forecast, and Purge Imported Forecast File.*

Press F22 to execute the purge and F3 to cancel and exit.

When you run this option, the system can automatically generate the Imported Forecast Purge report. This depends on your Control file settings.

MPGIFP 7/22/0		'IFL 11:26			IMPORTED	FORECAST	PURGE						PAGE	4 PG
				FCST		FORECAST							TRANSACTION	
CO	WHSE	PRODUCT	SIZE	TYPE	FORECAST DESCRIPTION	DATE	QUANTITY	UM	STATUS	ORIGIN	USER ID	TRANS ID	DATE	
INF01	INF01	PG-PRODUCT-1	EA	TFR	TEST MPS WITH TRANSFERS	01-01-2001	21059.0000	EACH	POSTED	FTP	PG	028506		
INF01	INF02	PG-PRODUCT-1	EA	PROMO	PROMOTIONAL SALE	06-01-2001	700.0000	KG	POSTED	VIA MP TRF	PG	028332		
						07-01-2001	650.0000	KG	POSTED	VIA MP TRF	PG	028332		
						08-01-2001	600.0000	KG	POSTED	VIA MP TRF	PG	028332		
						09-01-2001	550.0000	KG	POSTED	VIA MP TRF	PG	028332		
						10-01-2001	500.0000	KG	POSTED	VIA MP TRF	PG	028332		

***** RECORDS DELETED . . : 00147

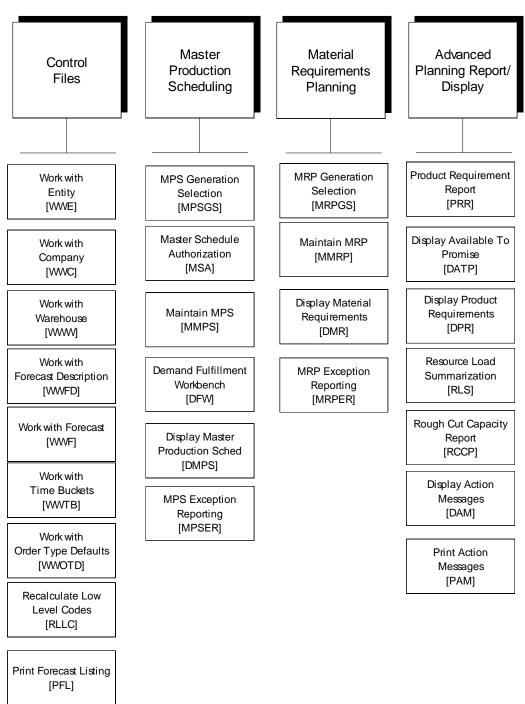
Infinium MP Guide to Setup and Processing

Notes

Appendix B Infinium Advanced Planning Menu Tree

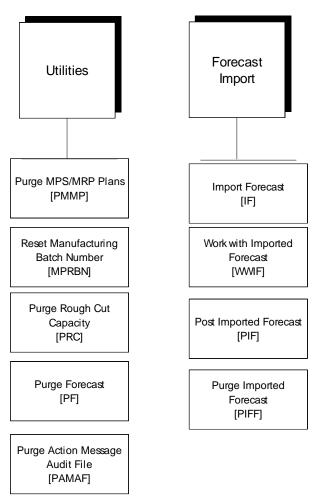
B

This appendix contains the menu tree for Infinium MP.



Infinium MP Menu Tree

Infinium MP Menu Tree



Notes

Appendix C Infinium MP Action Messages

C

Infinium MP uses action messages to recommend what you should do to correct a potentially unbalanced inventory situation. Action messages are system generated and system defined for you in the Infinium CA *Code Files* menu, the *Work with Code Tables* option.



WARNING

Do not delete the MPS Code type in the Work with Code Tables option

Action Message and Brief Description	MPS	MRP	Action You Should Take
Open Order This informs you that you have an order in the current time period that you need to address.	If there is a Suggested MPS quantity in any bucket after the first time fence, the system calculates the start date for that MPS. If the start date falls after the first time fence, the system sends this message.	If there is a Planned Order Release quantity in any bucket after past due, the system sends this action message.	Schedule a batch or enter a purchase order. If action has not been taken, it is possible that the MPS demand is misstated. Verify the accuracy of the MPS Suggested Order for this time frame.

Action Message and Brief Description	MPS	MRP	Action You Should Take
Inadequate Lead Time Message This tells you that you have a Suggested MPS or a Planned Order Receipt without ample lead time for filling.	If there is a Suggested MPS quantity whose start date falls within the first time fence, the system sends this message.	If there is a Planned Order Release quantity that falls in the past due bucket, the system sends this message.	Analyze the order to verify that it can be satisfied without adequate lead time.
Reschedule In This message tells you that you have receipts scheduled for a time bucket where they are not needed because the due date for the higher level demand, which generated the original order, has changed.	If 1) available inventory is greater than Maximum Reorder quantity and a quantity exists in either the Firm Planned or Scheduled Receipts bucket, and	If 1) projected available inventory is greater than the Maximum Reorder quantity and a quantity exists in the Scheduled Receipts bucket, and	If there is a shortage in an earlier time bucket for a Suggested MPS or a Planned Order Receipt, reschedule into that time bucket.
	2) the first Suggested MPS prior to this receipt occurs after the first time fence bucket then the system sends this message.	2) there is a prior Planned Order Receipt, then the system sends this message to schedule this receipt into the time bucket with the prior Planned Order Receipt.	

Action Message and Brief Description	MPS	MRP	Action You Should Take
Reschedule Out and Cancel These messages indicate that you have receipts scheduled for a time bucket where it is not needed or the system has found a place to reschedule this receipt.	You have a Firm Planned or a Scheduled Receipt quantity and either the available quantity is greater than the Maximum Reorder quantity or zero requirements (forecasts, orders, batch usage) exist.	You have a Scheduled Receipt quantity and either the available is greater than the Maximum Reorder quantity or zero requirements (independent or dependent demand) exist.	Depending on your message, either reschedule out or cancel the batch or purchase order.
	If the next Suggested MPS is less than the second time fence or action message cutoff, then the system sends a Reschedule Out message to the Suggested MPS. If this is not the case, then the system sends the Cancel message.	If the next Planned Order Receipt is less than the action message cutoff, the system sends a Reschedule Out message to the next Planned Order Receipt. If this is not the case, the system sends the Cancel message.	
Past Due Receipts This message indicates that you have receipts in the past due column.	If a Firm Planned or Scheduled Receipts quantity is in the past due column, the system sends this message.	If Scheduled Receipts are in the past due column, the system sends this message.	Check on receipts to verify that the MPS and MRP require- ments are still valid.

Action Message and Brief Description	MPS	MRP	Action You Should Take
Order Quantity Exceeded Maximum Reorder Quantity This message occurs when the item's Lot Size Technique is Lot for Lot with Min/Max. When a Suggested MPS or Planned Order Receipt is higher than the Maximum Reorder quantity, this lot size technique only allows the Suggested MPS or Planned Order Receipt to be the Maximum Reorder Quantity. The system sends this message to inform you that your order quantity is less than what is actually needed.	If there is a Suggested MPS quantity in a bucket that exceeds the Maximum Reorder quantity, the system sends this message. The Lot Size Technique resets the Suggested MPS to the Maximum Reorder quantity.	If there is a Planned Order Receipt quantity in a bucket that exceeds the Maximum Reorder quantity, the system sends this message. The Lot Size Technique resets the Planned Order Receipt to the Maximum Reorder quantity.	Review the plans to see if you can increase the order or if you can place an order somewhere else to cover this requirement.

Appendix D Downloading Sales History Information and Uploading Forecasts

D

The part consists of the following topics:

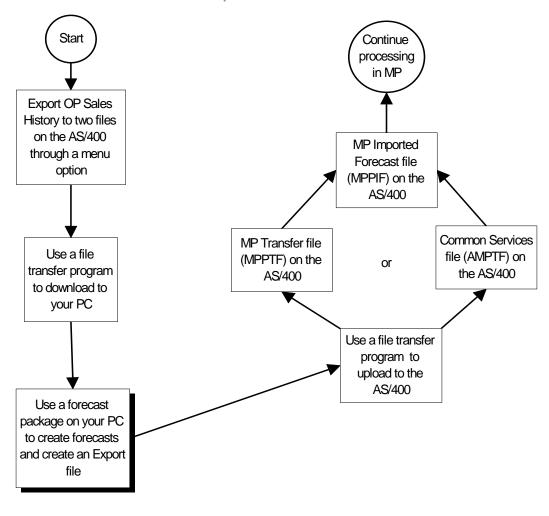
Торіс	Page
Overview of Downloading Sales History Data and Uploading Forecasts	D-2
Completing Preliminary Setup	D-7
Exporting Sales History on the AS/400 or iSeries	D-20
Downloading Sales History Data to the Forecast Application	D-22
Importing Data into Your Forecast Package and Preparing Forecasts for Export	D-23
Uploading Forecast Package Data to the AS/400 or iSeries	D-24
Importing Forecasts	D-25
Working with Imported Forecasts	D-34
Posting Forecast Records	D-44
Purging Forecast Records	D-49
Understanding Imported Forecast Reports	D-51

Overview of Downloading Sales History Data and Uploading Forecasts

Infinium OP provides you with the ability to export sales history data. You can then download the data to your PC for use with a forecast package. In a forecast package, you can analyze sales and create forecasts. You can then upload your forecasts to the AS/400 or iSeries 400 and import them into Infinium MP for use in the Master Production Schedule (MPS).

You can also create manual forecasts using the *Work with Forecast* option in Infinium MP. You can use whatever application you choose.

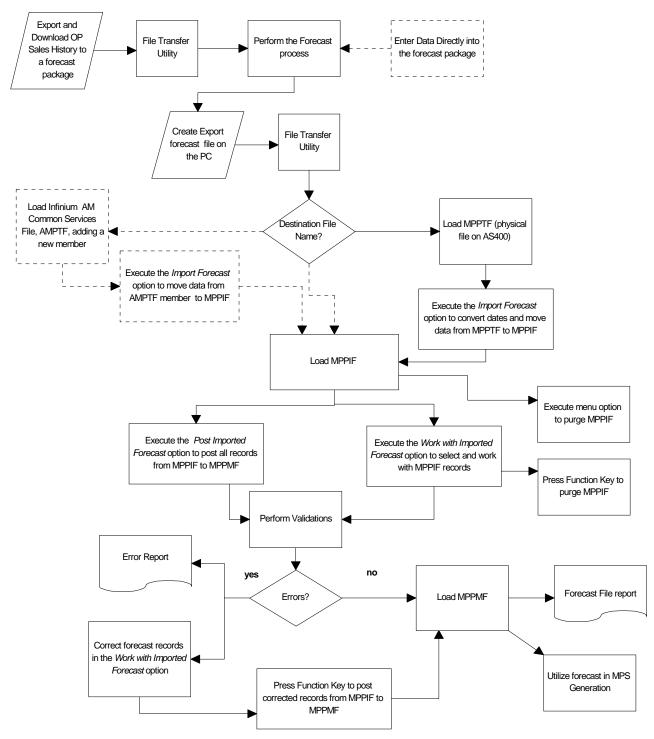
Use the Download/Upload Overview diagram to assist you in understanding the overall data flow.



Download/Upload Overview

Figure D-1: Download/Upload Overview

The Download/Upload Data Overview diagram identifies the high level steps involved in this process. For further information use the Detailed Download/Upload Data Flow Process diagram.



Detailed Download/Upload Data Flow Process

Figure D-2: Detailed Download/Upload Data Flow Process

Processing Steps Overview

The Detailed Download/Upload Data Flow Process diagram along with the steps below provide you with a high level view of the entire process. For further information on each step refer to the related topic in this appendix. Topic titles are identical to step titles.

Step 1 - Completing Preliminary Setup

Before you can upload and import data, you must complete the following:

- You must complete the Forecast Information attribute in the Infinium MP Control files. More fields are available at the entity level so you should complete the record at the entity level and if needed, make specific changes at the warehouse or company level.
- Prior to uploading data from the PC to the AS/400 or iSeries 400, you must move the PC forecast fields to the Infinium MP fields. You do this with a forecast package/Infinium template.
- In order for the AS/400 or iSeries 400 to receive your Export file from a forecast package, you must use a file transfer utility system. You can use IBM's Client Access or any other file transfer program. You can upload to the Infinium MP Transfer file, MPPTF, or you can upload to the Infinium Common Services file, AMPTF.

Step 2 - Exporting Sales History on the AS/400 or iSeries 400

Use the *Export Sales History* option under the *Order Processing Utilities* menu to export data to the AS/400 or iSeries 400. This option allows you to export into the Sales History Export Header (OPPSH) and the Sales History Export Details (OPPSD) database files.

Step 3 - Downloading Sales History Data to a Forecast Package on Your PC

Once you create the AS/400 or iSeries 400 Export files, you must download OPPSH and OPPSD to your PC. To accomplish this you can use IBM's Client Access or any other file transfer program.

Step 4 - Importing Data into a Forecast Package, and Preparing Forecasts for Export

Using a forecast package you import your sales history data, create forecasts, and then prepare your Export file.

Step 5 - Uploading forecast Data to the AS/400 or iSeries 400

Once you complete your forecasts and save them, you upload them to the AS/400 or iSeries 400. This may involve a special program or a macro. You can upload to the Infinium MP Transfer file (MPPTF) or you can upload to the Infinium Common Services file (AMPTF).

Step 6 - Importing Forecasts

Import forecasts using the *Import Forecast* option in Infinium MP. This option imports data from either MPPTF or AMPTF depending on your screen entries.

Step 7 - Working with Imported Forecasts

Once you import forecasts, you can display, edit, print, post, and purge them using the *Work with Imported Forecasts* option.

Step 8 - Posting Forecast Records

You have the following two options for transferring records from the Imported Forecast file (MPPIF) to the Production Forecast file (MPPMF):

- Use the *Post Imported Forecast* option to transfer all unposted records to the Production Forecast file (MPPMF); specifically, to transfer all newly received records and records from previous uploads that were not posted (probably due to an error).
- Use the *Work with Imported Forecast* option to choose a subset of records from the Imported Forecast file (MPPIF) based on your selection criteria.

Step 9 - Purging Forecast Records

Using the *Purge Imported Forecast File* option, purge forecast records with a status of Posted if you have not already purged them.

Purge from either the *Purge Imported Forecast File* option, or use the purge feature in the *Work with Imported Forecast* option.

Completing Preliminary Setup

You must complete or verify the following setup before you download sales history information and upload forecasts:

- Set Infinium MP forecast controls
- Perform field mapping for the forecast package and possibly for Common Services

Infinium MP Controls

Prior to uploading any forecasts from a forecast package into Infinium MP, you must define some controls in Infinium MP. All fields are available at the entity level, and limited fields are at the company and warehouse levels.

Use the menu path below.

- Control Files

	option: Change	s, press E	nter.				
0pt - - 2	MPS I MRP I Time		1	on			
					F18=Mess		

Figure D-3: Work with Entity Attribute selection screen

Defining Forecast Information Controls

To set forecast controls, type **2** next to the Forecast Information attribute and press \boxed{Enter} .

Default Fo	recast Type		ECST1 +		
Forecast] Point of Import f			M <u>PINFINIUM</u> 1 0=Common Service MPGISS	s, 1=MP	Trf file
List Pos	f Posted Forecas ted Forecast . ged Forecast .		1 0=Automatic, 1=Mar Y (Y=Yes, N=No) Y (Y=Yes, N=No)	ual	
	n kaus F3=Fvit	F4=Promot	F10=QuikAccess F24=Mc	na kaus	

Figure D-4: Work with Entity Forecast Information screen

Defining Entity Forecast Information Controls

Use the fields on this screen to define forecast settings and defaults.

Default Forecast Type

Use this field to establish your default, valid forecast type. You can override this when you create forecasts in Infinium MP and when you edit any imported forecasts.

Point of Origin

This field identifies the source application of the data you import. This value defaults into the *Import Forecast* option. The system does not validate this field; it is for information purposes only.

Import from

Use this field to identify the normal storage location of the transferred data. This value defaults into the *Import Forecast* option. Type **0** if you transfer the forecast data to Common Services or type **1** if you transfer the forecast data to the Infinium MP Transfer file (MPPTF).

Import Handler

Use this field to identify the program to run that retrieves the transferred forecast data and populates the Imported Forecast file (MPPIF).

You need to specify a program name in the *Import Handler* field only if you are using a custom program. If you are not using a custom program, leave this field blank and the system either uses the MPGICS (Infinium Common Services) or MPGISS

(Infinium MP Transfer file) program. The system determines the program to use by your entry in the *Import from* field.

The value in the Import Handler field defaults into the Import Forecast option.

If you import from Common Services and use the Infinium MP Import Handler program, MPGICS, ensure that the forecast data corresponds to the Infinium Template for Forecast Imports provided by your forecast package. This might require changes to the Infinium Template. Discuss these changes with your Infinium Implementation Consultant.

Delete of Posted Forecast

Use this field to specify how the system handles the deletion of posted records within the Imported Forecast file (MPPIF).

You may choose to delete records automatically when you post them. To do this, type **0** in this field. To retain posted records after posting, type **1** in this field. This allows you to control when the system deletes records from the Imported Forecast file by manually using the purge feature.

If you type **0** in the *Import Forecast Delete of Posted Forecast* field and **Y** in the *Import Forecast List Purged Forecast* field, the system automatically generates the Imported Forecast Post and Purge report whenever you post forecasts. If you purge forecasts with the previously mentioned settings, the system generates the Imported Forecast Purge report. If you type **1** in the *Import Forecast Delete of Posted Forecast* field and **Y** in the *Import Forecast List Posted Forecast* field, the system automatically generates the Imported Forecast field and **Y** in the *Import Forecast List Posted Forecast* field, the system automatically generates the Imported Forecast Post report whenever you post forecasts. A sample of these reports is in the "Infinium MP Reports" appendix.

List Posted Forecast

Type Y in this field to print a list of successfully posted forecasts after posting occurs.

List Purged Forecast

Type \mathbf{Y} in this field to print a list of successfully deleted forecasts after the purge occurs.

If you access this attribute at the warehouse or company level, the *Forecast Import Point of Origin, Import from*, and *Import Handler* fields are not available.

Press [Enter], then [F3] and complete the Confirmation window with 1 to save your entries.

Forecast Package Operation and Field Mapping

You must map the PC forecast package fields to the Infinium MP fields prior to exporting forecasts. You must map fields in the forecast package. The following is an example of the template you can use to accomplish this mapping in your forecast package.

This mapping is a one time setup that you can establish for 90 days, 52 weeks, or 24 months.

Required Order	Forecast Application Field Example	Output Transactions	Target MP Field in the MPPMF File	MP Field Description	MP Field Size and Type	Required for Upload?	Required value (if any)
1	Item Code		MFPRD	Product	20 A	Yes	Must pass validation.
2	Location Code		MFWHSE	Location	5 A	No, if blank the system uses the user's default.	
3	UD01	User data fields 1- 50	MFSIZE	Size Code	3 A	Yes, if Infinium CA Control files define products to require Size codes.	
4	UD02		MFTYPE	Forecast Type	5 A	No, if blank the system uses the default forecast type.	
5	UD03		MFCOMP	Company	5 A	No, if blank the system uses the user default company.	
6	UD04		MFUA1	User defined alpha 1	Variable	Depends on user control settings in Infinium CA.	Depends on user setup in Infinium CA.
7	UD05		MFUA2	User defined alpha 2			
8	UD06		MFUA3	User defined alpha 3			

Required Order	Forecast Application Field Example	Output Transactions	Target MP Field in the MPPMF File	MP Field Description	MP Field Size and Type	Required for Upload?	Required value (if any)
9	UD07		MFUA4	User defined alpha 4			
10	UD08		MFUA5	User defined alpha 5			
11	UD09	User data fields	MFUN1	User defined numeric 1	Variable	Depends on user control settings in Infinium CA.	Depends on user setup in Infinium CA.
12	UD10		MFUN2	User defined numeric 2			
13	UD11		MFUN3	User defined numeric 3			
14	UD12		MFUN4	User defined numeric 4			
15	UD13		MFUN5	User defined numeric 5			
16	UD14		MFUD1	User defined date 1			
17	UD15		MFUD2	User defined date 2			
18	UD16		MFUD3	User defined date 3			
19	UD16		MFUD4	User defined date 4			
20	UD17		MFUD5	User defined date 5			
21	UOM	Unit of Measure	MFUM	Forecast Qty UM	4 A	No, if blank the system	Must pass validation.

Required Order	Forecast Application Field Example	Output Transactions	Target MP Field in the MPPMF File	MP Field Description	MP Field Size and Type	Required for Upload?	Required value (if any)
						uses the product inventory unit of measure.	
22	Forecast Quantity	Forecast quantity array (varies based on standard 90 day, 52 week, or 24 month forecasts or any user defined time frame)	MFQTY	Forecast Quantity	13.4 N	Yes	Must be a non- negative value.

Common Services Operation and Field Mapping

The AS/400 or iSeries 400 needs to receive your Export file from your forecast package. You can accomplish this with a custom macro or a Visual Basic program. You can upload the file to either the Advanced Planning Transfer file (MPPTF) or the Commons Services file (AMPTF). Once you complete the upload, you use Infinium MP's *Import Forecasts* option to import the data from either source.

You must save the forecast export file in a comma delimited/text only format. You need to add the member to AMPTF using MPvvvxxxx. The 'vvv' represents your current version number of Infinium MP. The "xxxx" represents your specific naming convention. This naming convention assists in facilitating a call from Infinium MP to retrieve the data from the membered file. Review the Common Services diagram for further information.

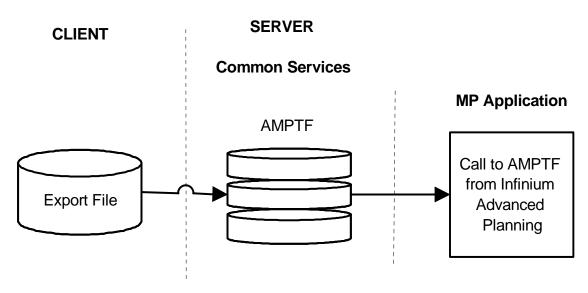


Figure D-5: Common Services

Infinium MP uses the mapping shown in the next table to convert the Common Services fields to Infinium MP fields. This conversion occurs when you import forecasts. If you plan to use Common Services, be sure to save your Export file using the AMPTF fields. Then, when Infinium MP calls Common Services (when you execute the *Import Forecasts* option), the system maps these fields to the Infinium MP fields.

Field Sequence in AMPTF	Beg Pos	End Pos	AMPTF Field Name	Size and Type	Target MP Field	MP Size and Type	MP Field Description	Required for Upload?	Required Value (if any)
44	73	77	TF51	5 A	IFCOMP	5 A	Company	No	If blank, the system uses the user's default company.
45	78	82	TF52	5 A	IFWHSE	5 A	Warehouse	No	If blank, the system uses the user's default warehouse.
109	582	601	TF201	20 A	IFPRD	20 A	Product	Yes	Must be a valid product.
34	43	45	TF31	3 A	IFSIZE	3 A	Size	Yes, if Infinium CA Control files are set to require this.	Must be a valid Size code.
164	2183	2187	TF901	9.0 N	IFDATE	8.0 N	Forecast Date (YMD 8)	Yes	The system automatically populates this field.
46	83	87	TF53	5 A	IFTYPE	5 A	Forecast Type	No	If blank, the system uses the default forecast type. Must be a valid forecast type.
248	2740	2747	TF1541	15.4 N	IFQTY	13.4 N	Quantity	Yes	Must be non- negative.
47	88	92	TF54	5 A	IFUM	4 A	UM	No	If blank, the system uses the product's inventory unit of measure.

Field Sequence in AMPTF	Beg Pos	End Pos	AMPTF Field Name	Size and Type	Target MP Field	MP Size and Type	MP Field Description	Required for Upload?	Required Value (if any)
121	822	851	TF301	30 A	IFUA1	30 A	UDF Alpha 1	Depends on user control settings in Infinium CA.	Depends on user setup in Infinium CA.
122	852	881	TF302	30 A	IFUA2	30 A	UDF Alpha 2		
123	882	911	TF303	30 A	IFUA3	30 A	UDF Alpha 3		
124	912	941	TF304	30 A	IFUA4	30 A	UDF Alpha 4		
125	942	971	TF305	30 A	IFUA5	30 A	UDF Alpha 5		
249	2748	2755	TF1542	15.4 N	IFUN1	15.4 N	UDF Numeric 1		
250	2756	2763	TF1543	15.4 N	IFUN2	15.4 N	UDF Numeric 2		
251	2764	2771	TF1544	15.4 N	IFUN3	15.4 N	UDF Numeric 3		
252	2772	2779	TF1545	15.4 N	IFUN4	15.4 N	UDF Numeric 4		
253	2780	2787	TF1546	15.4 N	IFUN5	15.4 N	UDF Numeric 5		
165	2188	2192	TF902	9.0 N	IFUD1	8.0 N	UDF Date 1		
166	2193	2197	TF903	9.0 N	IFUD2	8.0 N	UDF Date 2		
167	2198	2202	TF904	9.0 N	IFUD3	8.0 N	UDF Date 3	Depends on user control settings in Infinium CA.	Depends on user setup in Infinium CA.
168	2203	2207	TF905	9.0 N	IFUD4	8.0 N	UDF Date 4		
169	2208	2212	TF906	9.0-N	IFUD5	8.0 N	UDF Date 5		

It is important to understand specific requirements related to this data transfer. Your custom program or macro must read the PC file record, retrieve the first field (product/item), move product/item to TF01, and so on, and then write the record to AMPTF. One PC file record has many quantity fields. However, one AMPTF record has only one quantity field. This means your program or macro must read one PC file record and add as many AMPTF records as there are quantity fields in that PC file record.

For more information on using Common Services, refer to the *Common Services Technical Documentation*.

Bypassing Common Services

If you do not use Common Services to receive your Export file, and you want to use the MP Transfer file, you do not need a custom program or macro.

The simplest way to achieve the transfer is to use FTP (Internet's facility of file transfer protocol). Using FTP, you populate MPPTF with the PC file. Otherwise, you can use IBM's Client Access or any custom program on the PC.

Unlike the Common Services transfer, the system does not use one PC record to generate multiple records in MPPTF. Basically, that is why you do not need a special conversion program. You take one PC record (commas and all) and update its MPPTF record.

Exporting Sales History on the AS/400 or iSeries

If you use a forecast package, you can export sales history from Infinium OP to your AS/400 or iSeries and then using a file transfer program you can download the data to the forecast package. You can use the sales history data to calculate future sales demand.

The export is not product specific. For example, the Sales History Download Details file (OPPSD) contains records for all products sold during the fiscal year.

Use the menu path below.

- Infinium OP
- Order Processing
- Order Processing Utilities
 - ▼ Export Sales History [ESH]

11/03/97	12:11	:44	Export S	Gales Histor	y OPG	SHM	OPDSHM
Company				+			
Fiscal Year	••••			+			
Fiscal Mont	th			_			
Level				1			
View							
F2=Function	n keys	F3=Exit	F4=Prompt	F6=Create	F24=More keys		

Figure D-6: Export Sales History screen

The system requires entries in all the fields on this screen except for the *Fiscal Month* field. If you leave the *Fiscal Month* field blank, the system includes all months for the entry in the *Fiscal Year* field for the export.

Level

The *Level* field defaults to **1**. Level 1 contains the greatest amount of demand detail history. Level 2 is descriptive data plus other information. Level 2 uses Level 1 to determine information.

View

The *View* field is the identifier for this particular set of data. Any entry is acceptable.

The system only uses values in the *Level* and *View* fields within your forecast package. These values do not affect data selected for export.

Prior to exporting, the system clears the OPPSH and OPPSD files of all existing records. OPPSH consists of the selection criteria you specified on the screen. OPPSD consists of the Sales History data that the system selected according to the criteria you specified.

The export process adds a record to the Sales History Export Header file, OPPSH, which contains your export specifics. Understand that this file has exactly one record.

Press F6 to export the file.

The system only considers records with a matching Company code for populating the Sales History Export Details file (OPPSD). If you specified a month as part of export criteria, the system creates exactly one record in the OPPSD file for each key value with a matching *Company* field from the Sales History file (SASALMST). Key value criteria includes *Company*, *Warehouse*, *Salesman 1*, *Salesman 2*, *Customer*, *Ship-to*, *Product*, *Size*, and *Market Code*. If you do not specify a month, the system creates twelve or thirteen records from the Sales History file; one for each period of the year.



WARNING

After you export sales history, you must always download this data to your PC and then import it into your forecast package. If you run the *Export Sales History* option more than once without downloading, the Export files (OPPSH and OPPSD) have data corresponding to the latest selection, and data selected by previous export runs is lost.

Downloading Sales History Data to the Forecast Application

Once you create the AS/400 or iSeries Export files, you must download the files to your PC. To accomplish this, use IBM's Client Access or any other file transfer program.

The Sales History downloaded files (OPPSH and OPPSD) are in the Infinium OP Database library. The download process using your forecast package involves identifying the file on the server, selecting data, and saving the selected data on the PC. In your forecast package, save your data in comma delimited format. You must repeat these steps separately for the two exported files.

In the forecast package when you select data from OPPSD, you may select only a subset of data, for instance for a specific product.

Refer to your file transfer program documentation for further information.

You can select data for a specific product.

Importing Data into Your Forecast Package and Preparing Forecasts for Export

Use the *Import* function in your forecast package to retrieve the downloaded data from OPPSH and OPPSD into your forecast package. You can perfect forecasts using various functions available in your forecast package.

When your forecast is acceptable and ready to use in Infinium MP, you must save your forecast as a comma delimited/text only file on the PC. Save your forecast using the Export function in your forecast package. Infinium MP requires that as part of the Export specification, you save the field names as the first record in the Export file. Ultimately, the data in the Export file will go to the Infinium MP Forecast file (MPPMF).

Uploading Forecast Package Data to the AS/400 or iSeries

Once you complete your forecasts in your forecast package and save them, you can upload them to the AS/400 or iSeries. Again, you can use a custom program or macro to accomplish this. Upload to the Infinium MP Transfer file (MPPTF), or upload to the Infinium Application Manager Common Services file (AMPTF).

Importing Forecasts

Use the *Import Forecast* option to import forecasts from the Common Services Transfer file (AMPTF), or the Advanced Planning Transfer file, MPPTF. These forecasts then go into the Imported Forecast file (MPPIF) which is an intermediate file. Specifically, the system requires this because one Export file record must be split into multiple forecast records and because forecast dates are not part of data in an export record.

The Imported Forecast file (MPPIF) is a copy of the Infinium MP Forecast file (MPPMP), with some additional fields for control purposes. These include the *Status of the Record*, *Transaction (or Batch) Identifier*, *Date*, and *Time* fields.

Make sure no other user is performing any *Forecast Import* options when you execute this option. *Forecast Import* options include: *Import Forecasts, Work with Imported Forecast, Post Imported Forecast,* and *Purge Imported Forecast File.*

Use the menu path below.

- Forecast Import
 - Import Forecast [IF]

Importing Forecasts from Your Forecast Package

)efault Fo	recast	Type		ECST1 +		
Import f	Örigin rom		 	MPINFINIUM 1 0=Common MPGISS	Services, 1=MP	'Trf file
List Pos	ted For	ecast .	t 	1 0=Automatic Y (Y=Yes, N=N Y (Y=Yes, N=N	lo)	
	n keue	F3=Evit	F4=Promot	F10=QuikAccess	F24=More keus	1

Figure D-7: Import Forecast screen

Complete the fields below.

Point of Origin

This field identifies the source application of the data you import. This value defaults from the Infinium MP Control files. The system does not validate this field. This field is for information purposes only. Use this field to distinguish between forecasts created in your forecast application and forecasts created in Infinium MP.

Import from

Use this field to identify the normal storage location of the transferred data. This value defaults from the Infinium MP Control files. Type **0** if you have transferred the forecast data into Common Services, or type **1** if you transfer the forecast data into the Infinium MP Transfer file (MPPTF).

Import Handler

Use this field to identify the program to run that should retrieve the transferred forecast data and populate the Imported Forecast file, MPPIF.

You need to specify a program name in the *Import Handler* field only if you are using a custom program. If you are not using a custom program, leave this field blank and the system either uses the MPGICS or MPGISS program. The system determines the program to use by your entry in the *Import from* field.

The value in the Import Handler field defaults into the Import Forecast option.

If your data source is the MP Transfer file (MPPTF) be aware that the system clears this file of all data after this import, even if there are errors.

Verify the default entries on the screen and change them if necessary. Press F6 to execute the import. Press F3 to cancel and exit.

If you are using Common Services, a second Forecast Import screen displays. This screen displays all AMPTF members that belong to Infinium MP applications. From this screen you can make the following entries:

- **1** Type **1** to select a member to retrieve data from in order to populate MPPIF and to retain the member after processing
- 2 Type 2 to select a member to retrieve data from in order to populate MPPIF and to clear the member after the system retrieves the data
- 3 Type 3 to copy data from the selected member into another member *
- 4 Type 4 to delete a member*
- **5** Type **5** to display all data records in the members

* These functions take you to additional screens. For more information on using Common Services, refer to the *Common Services Technical Documentation*.

Press Enter after you make your selection.

Regardless of your data source, the system automatically generates the Import Forecast Exception report when you perform this option. The report heading differs by data source. The data source is either the Import Forecast Exceptions report or the Import Forecast via Common Services Exception report. The system also generates the Imported Forecast Listing report. You can also generate the Imported Forecast Listing report by pressing F8 on the Work with Imported Forecast screen. Samples of these reports follow and they are also in the "Infinium MP Reports" appendix.

MPGISS 6/11/0	0 17:	FIFL :26:22				IMPORTED	FORECAS	ΓL	ISTING				PAGE	1 PG
	WHSE	PRODUCT	SIZE	FCST TYPE	FORECAST DESCRIPTION	FORECAST DATE	QUANTITY	UM	STATUS	ORIGIN	USER ID	TRANS ID	TRANSACTION DATE	 [
COMP2	WHSE2	ITEM21	EA	FUTUR		00970601	17000.0000	KG	NEW	ANALYST 01	PG	024786	06-11-2000	
						00970701	19000.0000	KG						
						00970801	19000.0000	KG						
						00970901	22000.0000	KG						
						00971001	16000.0000	KG						
COMP2	WHSE2	ITEM22	EA	PROMO		00970601	700.0000	KG						
						00970701	650.0000	KG						
						00970801	600.0000	KG						
						00970901	550.0000	KG						
COMP4	WHSE4	ITEM41	EA	FUTUR		00970601	17000.0000	KG						
						00970701	19000.0000	KG						
						00970801	19000.0000	KG						
						00970901	22000.0000	KG						
						00971001	16000.0000	KG						
COMP4	WHSE4	ITEM42	EA	PROMO		00970601	700.0000	KG						
						00970701	650.0000	KG						
						00970801	600.0000	KG						
						00970901	550.0000	KG						
						00971001	500.0000	KG						
COMP5	WHSE5	ITEM51	EA	FUTUR		00970601	17000.0000	KG						
						00970701	19000.0000	KG						
						00970801	19000.0000	KG						
						00970901	22000.0000	KG						
						00971001	16000.0000	KG						
			***** RECOR	DS SELEC	TED . : 00018									
			***** RECOR	DS IMPOF	TED . : 00024									
						********	END OF REPORT	* * * * * *	* * * *					

This is the Import Forecast using the Infinium MP Transfer file – Imported Forecasts Listing. This listing displays all successfully imported forecast records. Remember the *Origin* and *Transaction ID* field values. In order to subset using the transaction ID in the *Work with Imported Forecast* option, you must obtain that information from this report.

	12:00:54 											
			FCST		FORECAST							TRANSACTION
O WHSI		SIZE		FORECAST DESCRIPTION	DATE	QUANTITY	UM	STATUS	ORIGIN	USER ID	TRANS ID	DATE
IF INF	PROD20	LB	*RR01		20000101	100.0000	LB	NEW	ANALYST 05	PG	025136	06-12-2000
					20000104	100.0000	LB					
					20000105	7000.0000	LB					
					20000106	5000.0000	LB					
					20000107	15000.0000	LB					
					20000110	250.0000	LB					
					20000114	200.0000	LB					
					20000121	10000.0000	LB					
					20000131	400.0000	LB					
					20000214	200.0000	LB					
	550501				20000228	500.0000	LB					
IF INF	PROD21	LB	FUTUR		20000731	5.0000	LB					
					20000801 20000802	10.0000 7.0000	LB LB					
					20000802	12.0000	LB					
					20000803	15.0000	LB					
					20000814	25.0000	LB					
					20000821	20.0000	LB					
					20000828	22.0000	LB					
					20000901	50.0000	LB					
					20001001	50.0000	LB					
					20001101	75.0000	LB					
					20000315	200.0000	LB					
					20000331	250.0000	LB					
					20000401	600.0000	LB					
					20000413	500.0000	LB					
IF INF	PROD20	LB	RETAL		20000801	200.0000	LB					
					20000802	100.0000	LB					
					20000803	250.0000	LB					
					20000804	300.0000	LB					
					20000805	100.0000	LB					
					20000815	1000.0000	LB					
					20000831	1500.0000	LB					
F INF	PROD23	LB	TFR		20001201	10.0000	LB					
					20001202	10.0000	LB					
					20001203	10.0000	LB					
					20001204	10.0000	LB					
					20001205	10.0000	LB					
					20001206	10.0000	LB					
IF INF	PROD25	LB	*RR01		20000501	2000.0000	LB					
					20000502	1000.0000	LB					
IF INF	BLSPRODUCT	N/A	SPEC		20001223	10.0000	LB					
					20001230		LB					
					20000106	10.0000	LB					
IF INF	PRODUCT5	EA	FUTUR		20000115	1000.0000	EA					
IF INF			*PG03		20001101	50.0000	LB					
IF INF	PROD11		*PG03		20001201	50.0000	LB	NEW	ANALYST 05	PG	025136	06-12-2000
IFINIUM			TFR		0000000							
					0000000							
		***** RECORI	JS SELEC	CTED . : 00050								
		***** 00000	O TMPOT	RTED . : 00049								

This is the Import Forecast using AM Common Services – Imported Forecast Listing report. This report displays all successfully imported forecast records.

MPGISS	MPTIFE	I M P O R T F O R E C A S T	PAGE	1
6/11/00	15:10:44	EXCEPTIONS REPORT		PG
IMPO	RTED FORECAST FI	LE, MPPIF, CANNOT BE ALLOCATED. ***** NO RECORDS SELECTED ********** END OF REPORT *********		

This is the Import Forecast using the Infinium MP Transfer file – Exceptions report. In this case, the system cannot allocate the Imported Forecast file and no further processing occurs. The system retains data in the Infinium MP Transfer file.

MPGISS	MPTIFE	I M P O R T F O R E C A S T	PAGE	1
6/11/00	15:21:10	EXCEPTIONS REPORT		PG

This is the Import Forecast using the Infinium MP Transfer file – Exceptions report. In this case, the system cannot allocate the Infinium MP Transfer file. No further processing occurs and data remains in the Infinium MP Transfer file.

MPGISS MPTIFE 6/11/00 17:26:22	I M P O R T F O R E C A S T EXCEPTIONS REPORT	PAGE	1 PG
TRANSACTION NUMBER:	_		
; AVAILABLE: 9	D01,UD02,UD03,UD04,UD05,UD06,UD07,UD08 THERE MUST BE AT LEAST ONE QUANTITY FIELD. MINIMUM NUMBER OF FIELDS E	XPECTED:	12
ITEM11,11,GL,RETAL, ITEM12,11,EA,RETAL, ITEM13,11,LB,RETAL,	1,,,,,,EACH,17217,19275,39433,22884,16410,18264,28625,22772,24989,21982,21813,21059		
TRANSACTION NUMBER: ITEM22,WHSE2,EA,PRC	MO,COMP2,,,,,,KG,700,650,600,550,5?0	OR PERIOD:	5
TRANSACTION NUMBER: IT,EM31,WHSE3,EA,FU	3 TUR,COMP3,,,,,KG,17000,19000,19000,22000,16000 FIELDS MISMATCH. TOTAL FIELD NAMES: 016 TOTAL DATA FIELDS: 0)17	
	***** RECORDS PROCESSED . : 00018 ***** TOTAL TRANSACTIONS : 00005 ***** TOTAL DATA RECORDS : 00009 ****** TOTAL DATA RECORDS : 00009		

This is the Import Forecast using the Infinium MP Transfer file – Exceptions report. In this example, the files have been successfully allocated and the transfer is complete. The system clears the Infinium MP Transfer file of all data.

MPGICS 6/12/00	MPTIFE 12:07:20	IMPORT	FORECAST EXCEPTIONS	СОММОN	SERVIO	CES	PA	GE	1 PG
IMPO	RTED FORECAST FILE	, MPPIF, CANNOT BE ***** NO RECORDS		 **	******** END	OF REPORT ***	******		

This is the Import Forecast using AM Common Services – Exceptions report. In this example, the system could not allocate the Imported Forecast file and no further processing occurs.

MPGICS MPTIFE	IMPORT FORECAST VIA COMMON SERVICES	PAGE 1
6/12/00 12:04:02	EXCEPTIONS REPORT	PG
SELECTED MEMBER, MP001D01	, IN COMMON SERVICES FILE, AMPTF, CANNOT BE ALLOCATED. ***** NO RECORDS SELECTED ************************************	

This is the Import Forecast using AM Common Services – Exceptions report. In this example, the system cannot allocate the Infinium MP Transfer file and no further processing occurs.

	MPTIF 12:00		PAGE	1 PG
RECORD 5	D NO. 50	ERROR DATA IN THIS RECORD CAUSED PROGRAM AMGCRDCS TO END ABNORMALLY. TRANSFER PROCESS TERMINATED.		
		***** RECORDS PROCESSED . : 00050 ***** RECORDS IN ERROR . : 00001 ****** END OF REPORT ********		

This is the Import Forecast using AM Common Services – Exceptions report. In this case the system successfully allocates the file and the transfer occurs.

Working with Imported Forecasts

Use the *Work with Imported Forecast* option to work with a subset of all the imported forecast records.

Use the menu path below.

Forecast Import

3=Posted, 4=All	to post
· · · · ·	to post
Transaction Id	to post,
User	
Date	
ate	

▼ Work with Imported Forecast [WWIF]

Figure D-8: Work with Imported Forecast Selection Criteria screen

Use the fields on this screen to tailor your display of forecast records.

F2=Function keys F3=Exit F10=QuikAccess F12=Cancel F18=Message line

KS CL IM DM II

Status

24-43

SA

M₩

Use this field to customize your display of forecast records. The system displays the records described, if you type the following code:

₩HQ421

KB

SNA01S4

0	Only new records
1	Records marked as erroneous
2	Records that are not new and are not in error

- **3** Records that are all already posted
- 4 All records, regardless of status

You can also use the *Transaction ID*, *User*, and *Date* fields to customize your display. You can obtain these values from the Imported Forecast Listing you generate at the time of import

Once you complete your selection criteria, press Enter.

Editing Forecasts

Posit	tion to			Forecas and Wareho Type	use . 		•				
			ss Enter. lete 5=Di				•				
0pt	Co	Whse	Product		Size	Type	Fore	ecast	Description	Status	
_	VMS	10	ABATTER		GL	MAX				ERROR	
_	VMS	10	BBATTER		GL	MAX				ERROR	
_	VMS	10	CAKEMIX		LB	DFALT				ERROR	
	VMS	10	CM-BATTER		GL	DFALT	DEFF	iult f	ORECAST TYP	ERROR	
_	VMS	10	FLOURMIX		LB	MAX				ERROR	
_	VMS	10	SUNDAE6		LB	Max	MAX	SALES		RDY TO	POS
_	VMS	10	SUNDAE8		LB	SALES	FOR	ORDER	PROCESSING	RDY TO	POS
_	VMS	10	SUNDAE9		LB	SALES				ERROR	
-	VMS	20	BANANASPL	IT	EA	MAX	MAX	SALES		ERROR	
_	VMS	10	BATTERMIX			MAX				ERROR	
										Bott	om
F2=Fi	unction	keys	F3=Exit	F6=Post	F7=Se	l crit	eria	F24=	More keys		

Figure D-9: Forecast Header List screen

The information that displays on this screen is the forecast header data determined by your entries on the Work with Imported Forecast selection screen. Use the *Opt* column to select a record for editing, deletion, or display. If you select a record for deletion, the system displays a confirmation screen.

Several function keys are also available. To print all records, press F8.

To post all records, press $\boxed{F6}$ and to purge all records, press $\boxed{F22}$. Both the posting and purging functions take you to confirmation screens. This appendix discusses these screens later.

At any point you can change your selection criteria by pressing F7 and changing your selection entries.

The first screen discussed is the Forecast Identification screen. To access this screen, select a record by typing 2 next to it and press Enter.

5/16/97	15:20:47	Work with	Imported For	recast MF	GIFM	MPDIFM
		Forecast	Identificat	ion		
Warehouse Product	 	· · · · · · · · · ·	VMS + 10 + CM-BATTER DEALT +	GL	_ +	
Select one	or more of	the following.	Then press	Enter.		
	te t Details fined Fields					
 F2=Functio	n keys F3=E	xit F4=Prompt	F6=Update	F24=More key	JS	
			·	_	-	
25-2	SA MW	KS CL				

Figure D-10: Forecast Identification screen

Forecast Identification Attributes

You can change any of the values at the top of the screen. These fields must contain valid entries before you can proceed to the various attributes.

To select one of the attributes, type any character beside the attribute and press Enter. This appendix discusses the Forecast Details attribute first and then the User Defined Fields attribute.

After you have made your edits to the attribute screens and pressed Enter, the system returns you to the Forecast Identification screen. Press F6 to save your entries. To save entries with errors, press F21.

					<u> </u>		
Company . Warehouse Product . Forecast T Date _4011997_	 	· · · · ·		cast Detai VMS 10 CM-BATI DFALT	TER .	gl Forecast	TYPE
F2=Functio	n keys	F3=Exit	F4=Promp	t F10=Qui	kAccess F	24=More ke	Bottor

Figure D-11: Forecast Details screen

Forecast Details

Access this screen by selecting the Forecast Details attribute on the Forecast Identification screen. On this screen you can alter a forecast by changing the *Date*, *Quantity*, and *UM* fields. Press Enter to save your entries.

You can remove one or more forecast details by pressing FieldExit on the fields. If you press FieldExit across all detail fields, the system deletes the forecast record.

You can not add a forecast to the system from this screen.

5/16/97	15:43:52	Work with Imported Forecast	MMGUDFM MMDUDFM
	Numeric Field de	s 	
Forecast c	omment 2	· · · · · · ·	
<u>User Numer</u> Last quant			-
		· · · · · · · · · · · · · · · · · · ·	
F2=Functio	n keys F4=Pro	mpt F10=QuikAccess F12=Cance ∎	I F18=Message line
24-40	SA MW	KS CL IM DM II WH	Q421 KB SNA01S4

Figure D-12: User Defined Fields screen

User Defined Fields

Access this screen by selecting the User Defined Fields attribute on the Forecast Identification screen.

You can edit your forecast user defined fields on this screen. Press Enter to save your entries.

Establish user defined fields for the Infinium MP Forecast file, MPPMF, using the *Work with User Defined Fields* option in Infinium CA.

Displaying Forecasts

To display a forecast record, type ${\bf 5}$ beside it and press $\fbox{\mbox{Enter}}$.

Poei	tion to	-	. Company				der Li					
1031			Product									
			Forecast									_
Tune	ontio	n nre	ss Enter.	- igpo	• •		• • •	•				
.	•		lete 5=D	ienlou								
2	onange	1 00	lete ob	ispiag								
0pt	Co	₩hse	Product			Size	Tupe	Fore	ecast () escription	Status	
5	VMS	10	ABATTER			GL	MAX				ERROR	
-	VMS	10	BBATTER			GL	MAX				ERROR	
-	VMS	10	CAKEMIX			LB	DFALT				ERROR	
_	VMS	10	CM-BATTER	3		GL	DFALT	DEF	AULT FO	DRECAST TYP	ERROR	
_	VMS	10	FLOURMIX			LB	MAX				ERROR	
	VMS	10	SUNDAE6			LB	MAX	MAX	SALES		RDY TO	P03
-	VMS	10	SUNDAE8			LB	SALES	FOR	ORDER	PROCESSING	RDY TO	POS
-	VMS	10	SUNDAE9			LB	SALES				ERROR	
-	VMS	20	BANANASPI	II		EA	MAX	MAX	SALES		ERROR	
_	VMS	10	BATTERMIX	<			MAX				ERROR	
_											Bot	tom
F2=F	unctio	n keys	F3=Exit	F6=P	ost	F7=Se	l crit	eria	F24=1	lore keys		
		0								0		
			-									
24	-24	SA	MW	KS	CL	IM D	M II		₩HQ421	L KB	S2KCTLS	1

Figure D-13: Forecast Header List screen

After you select a forecast record, the system displays the Forecast Identification screen.

5/19/97	8:10:56	Work with Imported Forecast	MPGIFM MPDIF	M
		Forecast Identification		
Warehouse Product		: 10 : ABATTER	GL	
Select one	or more of t	ne following. Then press Enter.		
	te t Details Pined Fields			
F2=Function	n keys F3=Ex	it F10=QuikAccess F12=Cancel	F18=Message line	
24-2	SA MW	KS CLIM DMII WH	Q421 KB S2KCTLS	1

Figure D-14: Forecast Identification screen

From this screen you can type any character next to either or both attributes and display all information regarding the forecast. Press Enter after you select an attribute or attributes.

Deleting Forecasts

To delete a forecast, type **4** beside it and press Enter .

Posi	tion to	Product		use . 		·		
	option, pre Change 4=De	ss Enter.	Type splay					
0pt	Co Whse	Product		Size	Type	Forecas	t Description	Status
-	VMS 10	ABATTER		GL	MĂX		•	ERROR
_	VMS 10	BBATTER		GL	MAX			ERROR
_	VMS 10	CAKEMIX		LB	DFALT			ERROR
_	VMS 10	CM-BATTER		GL	DFALT	DEFAULT	FORECAST TYP	ERROR
_	VMS 10	FLOURMIX		LB	MAX			ERROR
_	VMS 10	SUNDAE6		LB	MAX	MAX SAL	ES	RDY TO POS
_	VMS 10	SUNDAE8		LB	SALES	FOR ORD	ER PROCESSING	RDY TO POS
_	VMS 10	SUNDAE9		LB	SALES			ERROR
_	VMS 20	BANANASPL	IT	ĒA	MAX	MAX SAL	ES	ERROR
-	VMS 10	BATTERMIX			MAX			ERROR
-								Bottom
F8=P	rint F10=Qu	ikAccess	F18=Messag	e lin	∍ F22	=Purge	F24=More keys	

Figure D-15: Forecast Header List screen

After you press $\fbox{\sc Enter}$, the system displays the Confirm Delete of Forecast Records screen.

5/19/	/97 8:3	33:06 Wor	k with Impor	ted Fo	recast	MPGIFM	MPDIFM
		Confir	n Delete of F	orecas	t Records		
		confirm your o return to cha					
0pt 4	Co Whse VMS 10	Product BBATTER		e Type MAX	Forecast	Description	Status ERROR
							Bottor
F2=Fui	nction keys	s F10=QuikAco	cess F12=Car	icel F	18=Message	e line	
24-3	39 <mark>SA</mark>	MW	S CL IM D	M II	₩HQ42	21 KB S	S2KCTLS1

Figure D-16: Confirm Delete of Forecast Records screen

To continue with the deletion process, press Enter and to cancel press F12.

Printing Forecasts

To print forecasts, press $\boxed{F8}$. This print listing includes all forecast records within your selection criteria.

Posting Forecasts

To post all records within your listing, press F6. The system processes all unposted records that satisfy the current selection criteria in the Imported Forecast file, MPPIF; specifically, the system processes all newly received records and records from previous uploads that were not posted (probably due to errors).

The system performs all validation checks on the records. These are the same as the validations in the *Work with Forecast* option.

The system posts records that pass validation to the Advanced Planning Forecast file (MPPMF). The system assigns the status of Posted to the source record in the Imported Forecast file (MPPIF). This excludes this record from future postings. Or, you can set your Infinium MP Control files to automatically delete posted records from MPPIF. To do this, refer to the "Completing Preliminary Setup" topic in this appendix.

If a record already exists in the Production Forecast file, MPPMF, with identical key values as the record from MPPIF, the system overwrites it in MPPMF. If a record does not exist in MPPMF with the same key, the system adds it to MPPMF.

If a record does not pass the validations, the system marks it as Error and the error fields identify the type of error.

Whenever you post records, the system automatically generates the Imported Forecast Post Exceptions report. Also, depending on your Infinium MP Control file setup, the system may automatically print the Imported Forecast Post and Purge report or the Imported Forecast Post report. Samples of these reports are in the "Infinium MP Reports" appendix.

After you press F6 on the Forecast Header List screen, the system displays the Confirm Post screen.

Press F6 to confirm the post. To display information on the forecasts prior to posting, type either **5** or **9** beside the forecast and press Enter.

Purging Forecasts

The system assumes that all records associated with your selection criteria are the records you want to purge.

					nfirm						
			omitted to								
			er Forecast		elate	d optio	on w				
			purge proce								
	_	-	to submit f	-							
Stat					4	ALL					
User		• •		:							
Date											
			s 9=Displa	ay UDF		_	_		_	_	
Opt		lhse	Product				Fore	ecast	Description		
-	VMS		Abatter		GL	Max				ERROR	
_		10	BBATTER		GL	Max				ERROR	
_	VMS		CAKEMIX		LB	dfalt				ERROR	
_	VMS	10	CM-BATTER		GL	dfalt	DEFr	ault fi	orecast typ	ERROR	
_	VMS	10	FLOURMIX		LB	Max				ERROR	
_	VMS	10	SUNDAE6		LB	Max	Max	SALES		RDY TO	POS
_	VMS	10	SUNDAE8		LB	SALES	FOR	ORDER	PROCESSING	RDY TO	POS
										More	
F2=Fur	nction	keys	F3=Exit	F10=Quikf	lccess	F12=0	Cance	∍l F2∘	4=More keys		

Figure D-17: Confirm Purge screen

To purge forecasts, press F22. To display information on the forecasts prior to purging, type either 5 or 9 beside the forecast and press Enter.

Make sure no other user is performing any *Forecast Import* option when you execute this option. *Forecast Import* options include: *Import Forecasts, Work with Imported Forecast, Post Imported Forecast,* and *Purge Imported Forecast File.*

Posting Forecast Records

Use the *Post Imported Forecast* option to post all unposted records from the Imported Forecast file, MPPIF, to the Infinium MP Forecast database file, MPPMF.

Use the menu path below.

- Forecast Import
 - ▼ Post Imported Forecast [PIF]

5/19/97	9:10:35	Post Imported Forecast	MPGIFSB MPDIFSB
-		itted to post all records from Pile that have NOT yet been pos	
Exclus to exe	ive access t cute the pos	o the Imported Forecast file is . Make sure no other Forecast I run during this post process.	s required t Import
Press F	² ost key to	submit the job.	
F2=Function	n keys F3=E	kit F6=Post F10=QuikAccess F	18=Message line
24-2	SA MW	KS CL IM DM II 🖡	HQ421 KB S2KCTLS1

Figure D-18: Post Imported Forecast screen

Press F6 to post all unposted records in the Imported Forecast file, MPPIF. The system performs all validations as executed in the *Work with Imported Forecast* option. If a record from MPPIF fails one or more validations, the system identifies it as erroneous. The system also distinguishes this in the Posting Exception report.

If a record already exists in the Production Forecast file, MPPMF, with identical key values as the record from MPPIF, the system overwrites it in MPPMF. If a record does not exist in MPPMF with the same key, the system adds it to MPPMF.

Make sure no other user is performing any *Forecast Import* option when you execute this option. *Forecast Import* options include: *Import Forecasts, Work with Imported Forecast, Post Imported Forecast, and Purge Imported Forecast File.*

Whenever you post, the system automatically generates the Imported Forecast Post Exceptions report.

If you type 0 in the *Delete of Posted Forecasts* field and \mathbf{Y} in the *List Purged Forecast* field in the Infinium MP Control files, the system automatically generates the Imported Forecast Post and Purge report for you whenever you post forecasts.

If you type 1 in the *Delete of Posted Forecast* field and \mathbf{Y} in the *List Posted Forecast* field, the system automatically generates the Imported Forecast Post report whenever you post forecasts.

You can also post forecast records via the Work with Imported Forecast option.

Press F3 to cancel.

MPGIFS 7/22/0		FIFL 29:58				IMP	ORTED	FOREC	AST	POS	Т			PAGE	2 PG
CO INF	WHSE INF	PRODUCT PROD11	SIZE **	FCST TYPE FUTUR *** REC(DESCRIPTION S FRCST TYPE	FORECAST DATE 11/00/2000 12/00/2000 30	QUANTITY 50.0000 50.0000	UM LB LB	STATUS NEW NEW	ORIGIN	USER ID PG PG	TRANS ID 038683 038683	TRANSAC DATE 07/11/ 07/11/	2000
			* *	*** REC(ORDS POSTI	ED : 000)47		* * * * * *	**** END	OF REPC	RT ****	* * * * *		

PGIFS MPTIFSE 7/22/00 9:29:58		M P O R T E D F O R E C A S EXCEPTIONS REPORT		PAGE PG
		FORECAST		
CO WHSE PRODUCT	SIZE TYPE	DATE QUANTITY	UM	
NF01	TFR	03/00/2000	EACH	
		ERROR IN WAREHOUSE CODE		
		ERROR IN PRODUCT-SIZE CODE		
		ERROR IN UNIT OF MEASURE		
NF01	TFR	04/00/2000	EACH	
		ERROR IN WAREHOUSE CODE		
		ERROR IN PRODUCT-SIZE CODE		
		ERROR IN UNIT OF MEASURE		
NF01	TFR	04/00/2000	EACH	
		ERROR IN WAREHOUSE CODE		
		ERROR IN PRODUCT-SIZE CODE		
		ERROR IN UNIT OF MEASURE		
NF01	TFR	05/00/2000	EACH	
		ERROR IN WAREHOUSE CODE		
		ERROR IN PRODUCT-SIZE CODE		
		ERROR IN UNIT OF MEASURE		
NF01	TFR	05/00/2000	EACH	
		ERROR IN WAREHOUSE CODE		
		ERROR IN PRODUCT-SIZE CODE		
		ERROR IN UNIT OF MEASURE		
INF01	TFR	06/00/2000	EACH	
		ERROR IN WAREHOUSE CODE		
		ERROR IN PRODUCT-SIZE CODE		
		ERROR IN UNIT OF MEASURE		
NF01	TFR	06/00/2000	EACH	
		ERROR IN WAREHOUSE CODE		
		ERROR IN PRODUCT-SIZE CODE		
		ERROR IN UNIT OF MEASURE		
INF01	TFR	07/00/2000	EACH	
		ERROR IN WAREHOUSE CODE		
		ERROR IN PRODUCT-SIZE CODE		
		ERROR IN UNIT OF MEASURE		
INF01	TFR	07/00/2000	EACH	
		ERROR IN WAREHOUSE CODE		
		ERROR IN PRODUCT-SIZE CODE		
		ERROR IN UNIT OF MEASURE		
NF01	TFR	08/00/2000	EACH	
		ERROR IN WAREHOUSE CODE		
		ERROR IN PRODUCT-SIZE CODE		
		ERROR IN UNIT OF MEASURE		
	***** RECORDS PROC			
	***** RECORDS IN E	RROR . : 00083		

IMPORTED FORECAST POST

PAGE 5

MPGIFS 7/22/00		CIFL 01:12		IMPO	DRTED	FORECAST	POST	A N D	PURGE			PAGE	2 PG 		
	WHSE INF	PRODUCT PROD11	SIZE	FCST TYPE FUTUR		DESCRIPTION 'S FCST TYPE			QUANTITY 50.0000 50.0000	UM LB LB	STATUS NEW NEW	ORIGI	N USER ID PG PG	TRANS ID 038683 038683	TRANSACTION DATE 07/11/2000 07/11/2000
			***** RECORI ***** RECORI	OS SELEC DS POSTE		00130 00047									

********* END OF REPORT *********

Purging Forecast Records

Use the *Purge Imported Forecast File* option to purge only posted forecasts. Purge forecasts of any status using the *Work with Imported Forecast* option. Use the menu path below.

- Forecast Import
 - Purge Imported Forecast File [PIFF]

5/19/97	9:40:41	Purge Imported Forecast File	MPGIFPB MPDIFPE
		itted to delete all records fro file that have already been pos	
to exec	cute the purg	o the Imported Forecast file is ge. Make sure no other Forecas I run during this purge process	t Import
Press F	^o urge key to	submit the job.	
F2=Function	n keys F3=E	xit F10=QuikAccess F18=Messag	e line F22=Purge
24-2	SA MW	KS CLIM DM II W	HQ421 KB S2KCTLS1

Figure D-19: Purge Imported Forecast File screen

Make sure no other user is performing any *Forecast Import* option when you execute this option. *Forecast Import* options include: *Import Forecasts, Work with Imported Forecast, Post Imported Forecast,* and *Purge Imported Forecast File.*

Press F22 to execute the purge and F3 to cancel and exit.

When you run this option, the system automatically generates the Imported Forecast Purge report if you have the *List Purged Forecast* field set to \mathbf{Y} in the Infinium MP Control file. A sample of this report follows and is in the "Infinium MP Reports" appendix.

MPGIFP 7/22/00	MPT 10:	IFL 11:26			IMPORTED	FORECAST	PURGE						PAGE	4 PG
				FCST		FORECAST							TRANSACTION	
CO W	IHSE	PRODUCT	SIZE	TYPE	FORECAST DESCRIPTION	DATE	QUANTITY	UM	STATUS	ORIGIN	USER ID	TRANS ID	DATE	
INF01 I	NF01	PG-PRODUCT-1	EA	TFR	TEST MPS WITH TRANSFERS	01-01-2000	21059.0000	EACH	POSTED	FTP	PG	028506		
INF01 I	NF02	PG-PRODUCT-1	EA	PROMO	PROMOTIONAL SALE	06-01-2000	700.0000	KG	POSTED	VIA MP TRF	PG	028332		
						07-01-2000	650.0000	KG	POSTED	VIA MP TRF	PG	028332		
						08-01-2000	600.0000	KG	POSTED	VIA MP TRF	PG	028332		
						09-01-2000	550.0000	KG	POSTED	VIA MP TRF	PG	028332		
						10-01-2000	500.0000	KG	POSTED	VIA MP TRF	PG	028332		
			***** RECORD	S DELET	ED : 00147	******** EN	D OF REPORT	* * * * * * *	***					

Understanding Imported Forecast Reports

The following table identifies the available Infinium MP Forecast Import related reports and when the system generates them. All reports are in the "Infinium MP Reports" appendix.

Report Name	How Generated
Imported Forecast Listing report	The system automatically generates this report when you run the <i>Import Forecast</i> option. This lists the successfully imported records. You can also generate this report by pressing F8 on the Work with Imported Forecasts screen.
Import Forecast Exceptions report	The system automatically generates this report when you run the <i>Import Forecast</i> option. This report's title will depend on your data source. It will either be the Import Forecast Exceptions report (data source is the Infinium MP Transfer file) or Import Forecast via Common Services Exceptions report.
Imported Forecast Post Exceptions report	Whenever you post forecasts, the system automatically generates this report.
Imported Forecast Post report	If you type 1 in the <i>Delete of Posted Forecast</i> field and Y in the <i>List Posted Forecast</i> field on the Infinium MP Control files, the system automatically generates the Imported Forecast Post report whenever you post forecasts.
Imported Forecast Purge report	Whenever you run the Purge Imported Forecast option, the system automatically generates this report if you type \mathbf{Y} in the <i>List Purged Forecast</i> field in the Infinium Control files.
Imported Forecast Post and Purge report	If you type 0 in the <i>Delete of Posted Forecasts</i> field and \mathbf{Y} in the <i>List Purged Forecast</i> field, the system automatically generates the Imported Forecast Post and Purge report whenever you post forecasts.

Notes

Appendix E Calculations

E

	This appendix contains the calculations the system uses to determine quantities for Master Production Schedules and Material Requirement Plans.
Status	Calculation Definition
Forecast	The system determines this quantity by the manual forecast you establish in the <i>Work with Manual Forecasts</i> option on the <i>Control Files</i> menu.
	You categorize forecasts by forecast type and you can select forecast types to include for an MPS through the <i>Work with Order Type Defaults</i> option. You can override the order types you select as defaults for individual MPS plans.
Orders	The system calculates this quantity based on open customer orders in Infinium OP.
	In the <i>Work with Order Type Defaults</i> option you specify which order types to include in an MPS. You can override the order types you select as defaults for individual MPS plans.
Receipts	The system calculates the receipts quantity based on existing batches that produce this product. Batches that the system includes in this quantity are those with a status of scheduled or work in process (WIP). This calculation also includes Infinium PM purchase requisitions in the 01 , open status, and Infinium PM purchase orders in the 01 , open status. Infinium PM transfer requisitions are not included in this calculation.
	In the <i>Work with Order Type Defaults</i> option you specify which order types for manufacturing batches, purchase requisitions, and purchase orders the system should include in an MPS or MRP. You can override the order types you select as defaults for individual plans.

Status	Calculation Definition				
Usage	This quantity refers to batch usage based on batches in which this item is an ingredient. Batches that the system includes in this quantity are those with a status of scheduled, work in process (WIP), or firm planned.				
	In the <i>Work with Order Type Defaults</i> option you specify which order types for manufacturing to include in the MPS. You can override the order types you select as defaults for individual MPS plans.				
Firm Planned	The system calculates this quantity based on the production fill for firm planned batches currently on file.				
	In the <i>Work with Order Type Defaults</i> option you specify which order types for manufacturing to include in the MPS. You can override the order types you select as defaults for individual MPS plans.				
Available	The system calculates this value as follows:				
	Previous Period Available + Suggested MPS + Firm Planned Orders + Scheduled Receipts - Demand				
	The system calculates the demand value based on the consumption rule established in the Infinium MP <i>Control Files</i> menu.				
Plan ATP	The system calculates this value as follows:				
	Suggested MPS + Firm Planned Orders + Scheduled Receipts - Customer Orders				
	The customer orders component of the equation includes those orders for the current period and all subsequent periods up to the next period with a suggested MPS, firm planned order, or scheduled receipt.				

Status	Calculation Definition					
Suggested	When available inventory falls below zero or the minimum quantity established in the Item Warehouse (you define this decision in the Infinium MP <i>Control</i> <i>Files</i> menu), the system suggests a quantity based on the lot size technique assigned to the item.					
	Lot for Lot:					
	The suggested quantity is the net requirements for each period.					
	Fixed Order Quantity:					
	The suggested quantity is the fixed order quantity in the Item Warehouse file.					
	Lot for Lot with Min/Max:					
	The suggested quantity is the order policy/lot size quantity if the net requirements are less than the order policy/lot size quantity you establish in the Item Warehouse file; or the maximum reorder quantity if the net requirements are greater than the maximum reorder quantity specified in the Item Warehouse file. If the quantity falls between the order policy/lot size quantity and the maximum reorder quantity, the system suggests the net requirement.					
	Chase:					
	The suggested quantity is the forecast quantity for the time period.					
	Leveling:					
	The suggested quantity is the average of all time period requirements in the plan.					
Independent	The system calculates this value as follows:					
Demand	Customer Orders + Batch Usage					
	Independent demand values for each bucket include customer orders and usage from the start date of the period in which the value displays, up to the start date of the next period. This is only for batches with a scheduled or work in process status.					
	In the <i>Work with Order Type Defaults</i> option you specify which order types for manufacturing to include in the MPS/MRP. You can override the order types you select as defaults for individual MPS/MRP plans.					

Calculation Definition					
The system determines this value by the requirements from the MPS or a parent item.					
The planning horizons determine which MPS quantities the system will use for dependent demand:					
• For requirements up to and including the present cutoff period, the system uses firm planned orders from the MPS.					
• For requirements after the present cutoff period up to and including the future cutoff period, the system uses firm planned orders and the suggested MPS.					
The system calculates requirements from parent items based on the planned order release quantity for the parent item. The system uses that quantity and determines the quantity (dependent demand) for each ingredient by referencing the individual ingredient quantities specified in the formula used to produce the product.					
This quantity is the sum of products filled in manufacturing and purchasing. Purchasing includes open, 01 , purchase orders, and open, 01 , purchase requisitions from Infinium PM. The planned production date for the batch or the need date for the purchase order determines the bucket where quantities display. Infinium PM transfer requisitions are not included in this calculation.					
In the <i>Work with Order Type Defaults</i> option you specify which order types for manufacturing batches and purchase orders the system should include in an MPS or MRP. You can override the order types you select as defaults for individual plans.					
The system calculates this value as follows:					
Previous Period Available - Independent Demand -Dependent Demand + Receipts + Planned Order Receipts					
The system calculates this quantity using the following equation:					
Previous Period On hand - Independent Demand - Dependent Demand + Receipts					
This value is the quantity that must be available at the beginning of a period. When available inventory falls below zero or the minimum quantity you established in the Item Warehouse file, the system calculates planned order receipts based on the lot size technique assigned to the item.					
A parameter in the Infinium MP <i>Control Files</i> menu allows you to select how the system calculates this value. Use the <i>Plan when available less than</i> field on the MRP Information screen to select zero or minimum as the level at which an order should be placed.					
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Status	Calculation Definition				
Planned Order Release	The system calculates this quantity based on the planned order receipt quantity. To calculate this for each time period, the system uses lead times you established for individual items to determine when an item should be ordered or when a batch should begin production in order for the item to be available by the due date.				
	Enter lead times in the Item Warehouse file for individual items. In the <i>Work with Lead Time Control</i> option on the Infinium CA <i>Code Files</i> menu, you specify which of those lead times the system should use in calculating lead times for MRP processing.				

Notes